XIV. Economic Element

Introduction

Economic development has been characterized as a toolbox to be used to improve a community's *quality of life*. Economic development is not the goal—a better quality of life is the goal. Most people would agree that one of the main goals of government is to enhance the citizens' quality of life. In fact, our Declaration of Independence cites our unalienable rights of *Life* (health, safety, and welfare), *Liberty* (freedom of choice), and the *Pursuit of Happiness* (quality of life). So community economic development strives to provide a better quality of life by increasing its citizens' per capita disposable income.

An analogy has been drawn with the classic comedy film *Waking Ed Devine*, where a small Scottish town scams the national lottery and distributes the winnings evenly to every household in town. Although just an entertaining story, in reality, the bottom line of any economic development program should resemble that outcome. Quality of life will improve by increasing per capita disposable income, by whatever choices available in a particular region.

A community must recognize that it does not exist in complete self-sufficient economic isolation, but rather, that it is part of a larger economic region. Economic forces are not confined to a single area, but extend across city and county boundaries. For example, a worker may be employed in one city or county (*place of work*) and live in an adjacent jurisdiction (*place of residence*). It is now commonly understood that economic productivity in one community place of work is reduced if these workers spend their income in a separate community.

Similarly, local economic productivity is increased by the proportion of money inserted into the local economy by the sale of goods and services to outside communities. Thus, the level and nature of economic activity in a community are conditioned not only by its internal policies and socioeconomic characteristics, but also by such policies and characteristics in the surrounding commutershed and market area.

Traditionally, economic development has worked to increase per capita disposable income by three basic methods:

1) Attract those private and public activities that import and circulate money in the local economy by exporting goods and services to the regional market area and beyond;

2) Attract private capital investment to broaden the tax base for cost-effective public services; and

3) Attract private and public activities that create full-time permanent jobs for local residents that pay better than average local wages. Of course, this last method also requires an adequately trained and available local labor force.

This Economic Element will help implement these three basic methods by providing a framework for detailed action programs. There are no binding standards to assess compliance of any Economic Element of a Comprehensive Plan with state planning laws.

However, to be "internally consistent" as required under Florida law, an Economic Element must not conflict with other Comprehensive Plan Elements. Further, the most effective Comprehensive Plan would contain mutually reinforcing Elements including: Economic Development, Future Land Use; Traffic Circulation; Housing; Sanitary Sewer, Solid Waste, Drainage, and Potable Water; and Capital Improvements.

The first section of this Element summarizes current socioeconomic conditions in Clewiston and its economic region, and analyzes strengths, weaknesses, opportunities and threats (SWOT) to be considered in charting its future in the regional economy. The remaining section then suggests economic development goals, objectives, and policies designed to achieve preferred development. These provide a framework for selecting options and detailing future economic development action programs.

Current Conditions

These next sections summarize the most recent available socioeconomic data that accurately defines how Clewiston is economically linked to the surrounding market area. The data highlights the similarities and differences between the City and its surroundings, so that potential future opportunities and constraints may be identified.

Regional Geography

Figure XIV-1 on page 4 illustrates several aspects of the Clewiston economic region:

1. Clewiston lies at the center of the very diverse Hendry, Glades, and Palm Beach Counties market area and commutershed consistent with the findings of the 2002 *Labor Force Availability Study* sponsored by the Hendry County Economic Development Council.

2. Clewiston serves as the Hendry County gateway and connecting link of the six-county Heartland Economic Region to the more densely populated coastal area of the Southeast Economic Region.

3. Clewiston lies at the midpoint of State of Florida Strategic Intermodal System (SIS) highway, rail, and waterway ‘Corridors’ connecting SIS airport, seaport, and passenger terminal ‘Hubs’.

An informal survey of Clewiston business persons indicates that more employees, customers, college students, and shoppers are oriented to Palm Beach County and the Atlantic coast, than to Lee County and the Gulf coast.

Clewiston geography of climate, topography, and natural resources have already been inventoried in related City and County Comprehensive Plan Elements and Evaluation and Appraisal Reports (EARs). The most significant difference between the City and the eastern coastal edge of the economic region is that the City lacks saltwater natural resources such as beaches, but can capitalize on the unique presence of the huge freshwater Lake Okeechobee and Waterway.

FIGURE XIV - 1

Economic Geography of Clewiston Region
10 0 10 20 30 40 50 Miles
Port of Tampa
Airport
HILLSBOROUGH
POLK
MANATEE
HARDEE
DESOTO
SARASOTA
OKEECHOBEE
HIGHLANDS
ST.LUCIE
MARTIN
GLADES
CHARLOTTE
Clewiston
LEE
HENDRY
PALM BEACH
COLLIER
BROWARD
MONROE
MIAMI-DADE
Port of Palm Beach
Palm Beach International Airport
Southwest Florida International Airport
Port Everglades
Ft. Lauderdale - Hollywood International Airport
Port of Miami
Miami International Airport
SIS & Emerging
Hubs & Corridors with General Connector Locations
LEGEND
SIS
Hubs
Airports
Seaports
Passenger Terminals
Spaceport
Intermodal Freight - Rail Terminals
Proposed High Speed Rail Stations
Corridors
Highway
Rail
Waterways
Proposed High Speed Rail
Connectors
Planned Intermodal Connector Area
Emerging
Hubs
Airports
Seaports
Passenger Terminals
Intermodal Freight - Rail Terminals
Corridors
Emerging Highway
Emerging Rail
Emerging Waterways
Economic Regions
Northwest
North Central
Northeast
East Central
West Central
South Central
Southwest
Southeast
State of Florida Department of Transportation Office of the State Transportation Planner Office of Policy Planning
Project Manager: Mr. Terry Kraft, AICP, PE
Office of Policy Planning
Tallahassee: 1-850-414-4801
Toll Free: 1-866-SIS-FDOT (747-3368)

Regional Population Characteristics

Slow growing population trends without aggressive economic development may cause serious financial dilemmas. If population growth and the resulting tax revenue growth is less than the increase in costs, tax rates may rise or public services may be cut. However, the actual trends in Clewiston may be more accurately seen in Table XIV.1 which compares annualized population growth in the Hendry/Glades portion of the Heartland Economic Region with the Palm Beach portion of the Southeast Economic Region, and with the State of Florida, from 1980 to 1990, 1990 to 2000, and 2000 to 2002.

Table XIV.1
Historic Population Changes in the Clewiston Market Area

	1980	1990	Annual %	2000	Annual %
Clewiston	4,871	5,776('88)	2.8%	6,460	1.0%
Remaining Hendry	13,728	19,997	4.6%	29,750	4.9%
Glades	5992	7,591	2.7%	10,576	3.9%
H/G	26,571	33,364	3.6%	46,786	4.0%
Palm Beach	576,758	863,503	5.0%	1,131,191	3.1%
State of Florida	9,746,961	12,938,071	3.3%	15,982,400	2.4%

Source: U.S. Census/Bureau of Economic and Business Research, University of Florida, 2003

From 1980 to 1990, Clewiston grew at a slower annual rate (2.8%) than Hendry/Glades (3.6%), Palm Beach County (5.0%), and the State of Florida (3.3%). However, from 1990 to 2000, the interior/coastal difference reversed. With the Clewiston annual growth slowing to1%, the Hendry/Glades rate still accelerated to 4%, while Palm Beach County slowed to 3.1%, and the State slowed to 2.4%.

Table XIV.2 indicates that the Bureau of Economic and Business Research (BEBR) most likely "Medium" long-term population growth rate of Hendry/Glades (1.3%) dips below Palm Beach County (1.4%), with Florida at (1.2%). However, the draft Hendry County Comprehensive Plan Economic Development Element opines that "it does not appear unreasonable to use the "High" level projections". This would add an additional 10% in 2010, 21% in 2020, and 33% in 2030 to the Hendry County population growth, but more likely adjacent to the fast-growing Lee County market than to Clewiston.

Table XIV.2						
Projected Medium Rate Population Growth (rounded to hundreds)						
	2010	**Annual %**	**2020**	**Annual %**	**2030**	**Annual %**
Hendry	43.1	1.9%	50.7	1.8%	57.8	1.4%
Glades	12.2	1.5%	13.8	1.3%	15.2	1.0%
H/G	55.3	1.8%	64.5	1.7%	73.0	1.3%
Palm Beach	1,378.3	2.2%	1,619.9	1.8%	1,845.3	1.4%
State of Florida	18,978.4	1.9 %	21,807.1	1.5%	24,428.3	1.2%

Source: Bureau of Economic and Business Research, University of Florida, 2003

Regional Demographics and Labor Force

Changes in regional age distribution noted in Table XIV.3 and Table XIV.4 indicate emerging economic issues and challenges to be dealt with by the City of Clewiston.

Table XIV. 3						
2002 Age Group Distribution (rounded to hundreds)						
	<18	**%**	**18/64**	**%**	**65+**	**%**
Hendry	10.8	30%	22.3	60%	3.7	10%
Glades	2.3	21%	6.3	59%	2.0	20%
H/G	13.1	28%	28.6	60%	5.7	12%
Palm Beach	248.2	21%	665.7	56%	289.3	23%
State of Florida	3,750.3	22%	9,989.7	60%	2,934.6	18%

Source: Bureau of Economic and Business Research, University of Florida, 2003

Table XIV.4												
Projected Most Likely Change of Age Group Distribution (rounded to hundreds)												
	2010						**2025**					
	<18	**%**	**18-64**	**%**	**65+**	**%**	**<18**	**%**	**18-64**	**%**	**65+**	**%**
Hendry	12.9	30%	25.5	59%	4.7	11%	16.9	31%	29.3	54%	8.1	15%
Glades	2.2	18%	7.4	61%	2.6	21%	2.4	17%	8.0	55%	4.0	28%
H/G	15.1	27%	32.9	60%	7.3	13%	19.3	28%	37.3	54%	12.1	18%
Palm Beach	271.0	20%	796.3	58%	311.0	22%	320.0	18%	887.6	51%	530.0	31%
Florida	4,023.5	21%	11,464.6	61%	3,490.3	18%	4,663.1	20%	12,608.9	54%	5,965.7	26%

Source: Bureau of Economic and Business Research, University of Florida, 2003

From 2002 to 2025, the proportion of school age population (under 18) will likely remain fairly constant at 28% in Hendry/Glades. The proportion in this group will decline slightly statewide from 22% to 20%, and in Palm Beach County from 21% to 18%. This means that the Hendry/Glades children/youth programs and school districts may not experience any relief in costs. Recent studies document that southwest Florida interior counties and school districts generally levy higher millage rates than their coastal neighbors.

At the top end, the population over 65 years of age also represents a segment that also for the most part, is not active in the provision of goods and services. But this segment does play a significant role in the regional economy as consumers, and is growing everywhere. In Hendry/Glades this potential market will grow from 12% to 18%, in Palm Beach from 23% to 31%, and in Florida from18% to 26%. The major sectors supported by retiree spending are the services, retail and financial sectors. Typically, this age group has higher than average discretionary income, since homes tend to be paid for, and this group already possesses a stock of durable goods. Thus, retirees tend to have unique purchasing behaviors characterized by entertainment and leisure, health care, and non-durable retail expenditures, all supporting the service and retail trade sectors. Whatever happens with national retirement trends, these residents will comprise an increasingly important segment of the economy.

The remaining 18 through 64 age group represents the pool from which will come the potential labor force (in 2000, 64% of the Hendry age group and 56% of the Glades age group) to provide goods and services in the regional economy. Here again, the trends are similar in every area. The proportion of working age population remained fairly constant until 2010, but can then be expected to decline by 2025; 60% to 54% in Hendry/Glades, 58% to 51% in Palm Beach, and from 61% to 54% in Florida.

Regional Income

Table XIV.5 summarizes findings of the 2002 Economic Development Research Group (EDRG) report; *Southwest Florida Targeted Industry Study* sponsored by the Southwest Florida Regional Planning Council (SWFRPC), which compared 1990 – 1999 income growth of Hendry/Glades with the four remaining Heartland Economic Region counties (Desoto, Highlands, Hardee, and Okeechobee, Palm Beach was not included in this study, see Fig XIV-1), with three Panhandle area counties, (Liberty, Franklin, and Gadsden) and with the State of Florida:

Table XIV.5				
Income Growth in Hendry/Glades and Comparison Areas				
	Per Capita Income ’99	**% Growth 1990 – ‘99**	**Median Income ’97**	**%Growth 1990 – ‘97**
Hendry	$24,858	147.7%	$28,352	13.7%
Glades	$18,905	76.4%	$26,336	27.3%
R. Heartland	$22,776	94.1%	$25,908	21.8%
Panhandle	$18,795	106.5%	$24,978	27.0%
Florida	$27,781	39.0%	$32,877	19.6%

Source: EDRG/SW Florida Regional Planning Council, 2002

Despite significant individual variations, the average Hendry/Glades per capita income and growth rate would be generally similar to that of the four remaining Heartland Counties, and slightly exceed that of the Panhandle Counties. In 1997, median household income for Hendry/Glades significantly exceeded that of both comparison areas. The State of Florida average incomes exceeded both measures in Hendry/Glades, but grew more slowly except for Hendry median income.

Aggregate Employment Distribution

The same 2002 EDRG/SWFRPC study identified the latest aggregate-level employment data which includes Farm sector employment in the *Agricultural Services Sector*. This data demonstrates the employment mix for the Clewiston market area/ commutershed of Hendry, Glades, and northwest Palm Beach Counties (H/G+), as compared with characteristics of the same Comparison Areas as indicated in Table XIV.6.

Table XIV.6				
Aggregate Distribution of Employment, Year 1999				
Industry	**H/G+**	**R. Heartland**	**Panhandle**	**Florida**
Ag. Serv./Farming	38%	33%	7%	3%
Construction	3%	5%	8%	6%
Manufacturing	7%	4%	21%	8%
Wholesale Trade	9%	3%	6%	6%
Retail Trade	22%	22%	26%	23%
F.I.R.E.	5%	3%	4%	8%
Services	13%	26%	22%	40%
Transportation	3%	3%	4%	6%

+ Inclusion of Immokalee area data provides a rough approximation of presently unavailable NW Palm Beach data.
Source: Florida County Perspectives, Bureau of Economic and Business Research, University of Florida, 2000

Comparing Clewiston market area (H/G+) aggregate employment distribution to the Remaining Heartland Economic Region in Table XIV.6, *Construction* is a bit lower, *Manufacturing* and *Wholesale Trade* are significantly higher, and *Finance Insurance Real Estate (F.I.R.E.)* a bit higher. S*ervices* are significantly lower compared with all other areas. Both share a concentration of employment in the combined *Agricultural Services and Farming* sector that is much higher than in the Panhandle Comparison area or in Florida. The Panhandle Comparison Area has a much higher percentage than all the areas examined, of employment in *Manufacturing*, which tends to have better paying jobs.

Table XIV.7 Manufacturing Employment, Year 2000				
Area	**Total PNF Employed**	**Total Mfg. Employed**	**% of PNF in Mfg. Ind.**	**# of Mfg. Industries Represented**
H/G+	18,427	1,255	10%	12
R. Heartland	44,038	1,974	4.5%	18
Panhandle	15,190	2,458	16.2%	16

+ Inclusion of Immokalee area data provides a rough approximation of presently unavailable NW Palm Beach data.
Source: Dun & Bradstreet, DMS data 2000

Table XIV.7 indicates that although manufacturing employment in the Clewiston market area (H/G+) represents 10% of total private, non-farm (PNF) employment (compared to 16% in the Panhandle Comparison Area), the Clewiston market area manufacturing activity is less diversified in number than in either the Remaining Heartland or Panhandle Comparison Areas.

As previously indicated in Table XIV.6, the Panhandle Comparison area is quite concentrated in *Manufacturing*, and as Table XIV.7 portrays, with roughly the same number of total employed as the Clewiston market area, has about twice as many jobs in manufacturing.

A single activity, *Food Products Manufacturing*, is responsible for over 80% of total manufacturing employment in the Clewiston market area, as revealed in Table XIV.8. While in the Comparison Areas, several types of manufacturing share dominance as employers.

Table XIV.8			
Top Three Manufacturing Employers in Clewiston and Comparison Market Areas			
(% of total manufacturing employment)			
Area	**Top Manufacturing**	**2nd Manufacturing**	**3rd Manufacturing**
Clst (H/G+)	Food Products (82%)	Machinery & Cmptr. Equipment (5%)	Stone, Clay & Glass (4%)
R. Heartland	Printing & Publish. (16%)	Rubber & Plastic Products (11%)	Machinery & Computer Equipment (11%)
Panhandle	Printing & Publish (30%)	Fabricated Metals (16%)	Lumber & Wood Products (15%)

+ Inclusion of Immokalee area data provides a rough approximation of presently unavailable NW Palm Beach data.
Source: Dun & Bradstreet, DMS data 2000

Interestingly, *Machinery & Computer Equipment Manufacturing* shows up in the top three manufacturing employers in both the Clewiston and the Remaining Heartland market areas. Both these areas also have a high concentration of employment in *Agricultural Services and Farming* (Table XIV.6). A closer look an the Dun and Bradstreet business-level data for these areas shows that most of the manufacturing activity in the *Machinery & Computer Equipment Mfg* sector is linked to *Farm* sector requirements.

Table XIV.9 indicates the major employers in the City of Clewiston along with the estimated number of full-time and part-time employees.

Table XIV.9	
Current Major Employers in the City of Clewiston	
Business	**Estimated # of Full/Part-Time Employees**
U.S. Sugar Corporation	2,000
Wal-Mart	300
Hendry County School Board	250
Hendry Regional Medical Center	150
City of Clewiston	125
Southern Gardens Citrus	125

Source: Clewiston Chamber of Commerce

Growth Industries

The EDRG study found that employment in the Clewiston market area increased overall by 32% from 1989 to 1999. Industry employment on the Remaining Heartland Economic Region showed an overall growth of 27%, while employment declined by 3% in the Panhandle Comparison Area. See Tables XIV.10 and XIV.11 for percent change by industry.

Table XIV.10	
Employment Changes by Industry in the Heartland Economic Region, 1989-1999	
Clewiston Market Area (H/G+)	**Remaining Heartland**
Wholesale Trade (+104%)	Agriculture/Farming (+65%)
Services (+69%)	Services (+59%)
Retail Trade (+43%)	Transportation (+27%)
Ag Services/Farming (+37%)	Mining (+17%)
Transportation (+24%)	Wholesale Trade (+7%)
Manufacturing (+21%)	Retail Trade (+2%)
-	
Construction (-16%)	Construction (-13%)
F.I.R.E. (-44%)	F.I.R.E. (-16%)
Mining (-59%)	Manufacturing (-28%)

+ Inclusion of Immokalee area data provides a rough approximation of presently unavailable NW Palm Beach data.

Source: BEBR current and historical data from 2000 Florida County Perspectives and CBP data.

Table XIV.11	
Employment Changes by Industry in the Panhandle Area and Florida, 1989-1999	
Panhandle	**Florida**
Wholesale Trade (+97%)	Services (+70%)
Services (+17%)	Transportation (+33%)
Transportation (+5%)	Wholesale Trade (+27%)
F.I.R.E. (+3%)	F.I.R.E. (+22%)
-	Retail Trade (+19%)
Manufacturing (-2%)	Construction (+8%)
Retail Trade (-3%)	Agriculture/Farming (+5%)
Construction (-13%)	-
Mining (-26%)	Manufacturing (-9%)
Agriculture/Farming (-49%)	Mining (-41%)

Source: BEBR current and historical data from 2000 Florida County Perspectives and CBP data.

- Hendry County employment grew the fastest (by nearly 40%) while Glades County employment grew the slowest (13%).
- The fastest growing sectors of the Clewiston market area economy are *Wholesale Trade, Services, Retail Trade, Agricultural Services, Farming,* and *Transportation.*
- From 1989 to 1999, *Wholesale and Retail Trade* in the Clewiston market area experienced higher percentage growth than the two comparison areas or the State.
- The fastest growing industry in the Clewiston market area is *Wholesale Trade*, which increased by 753 jobs (104%) from 1989 to 1999, and grew fastest in Hendry County.

- In the same period, *Retail Trade* increased by 1,029 jobs (42.6%) and *Services* grew by 839 jobs (69%), showing positive growth in the Clewiston market area.
- The *Manufacturing* sector increased by 193 jobs (23% in Clewiston market area), despite loss of manufacturing jobs in Glades County, thus *Manufacturing* growth has been concentrated in Hendry County.
- *Transportation* employment increased by 104 jobs (24%) in the Clewiston market area. Again despite losses in Glades County, *Transportation* employment grew predominantly in Hendry County.
- Employment in Finance, Investment, and Real Estate (F.I.R.E.) and Mining decreased in the Clewiston and the two Comparison market areas.
- *Construction* employment decreased in both Hendry and Glades Counties.
- *Agricultural Services and Farming* employment (combined) increased by at least 1,529 jobs (37%) in just Hendry and Glades Counties.

Farm Sector

Agricultural activity is a significant part of the southwest Florida economy. This fact is becoming more pronounced as a cold weather trend in the northern and central portions of the state has caused citrus farm operations to reestablish groves, starting in the late 1980s, in the warmer areas of the state where ample acreage has been available and affordable.

With farm-based economies come issues concerning uncertainty (both in production and markets), seasonal employment, migrant communities, competing land use pressures, upside potential on value-added farm production and income generation. Farm-based economies often require local businesses that provide support services (*Agricultural Services*) and may also be linked, or have potential to link, to local food processing, manufacturing, and transport activities.

In the 1997 Census of Agriculture, Hendry County had 403 farms that accounted for 82% of the County land area. Foreign-owned acreage represents 1.5% of total farm acreage. The average farm size comprises 1,500 acres and is the second largest when compared to all counties in the Economic Development Research Group (EDRG) study. Farms in Hendry County earn 95% of their revenue from crops (predominantly sugarcane, citrus groves, and vegetables) and the remainder from livestock. The average market value of farm sales in 1997 was $803,000, up by 14% since 1992.

Glades County had 188 farms according to the 1997 Census of Agriculture, accounting for 76.8% of the County land area. Foreign-owned acreage comprises 15% of the total farm acreage. The average farm size comprises 2,023 acres and is the largest when compared to elsewhere in the EDGR study and the state average of 300 acres. Consistent with state averages, farms in Glades County earn 80% of their revenues from crops (predominantly sugarcane, orchards, and hay-alfalfa) and the remainder from livestock. The average market value of farm sales in 1997 was $311,000, up by 13% since 1992.

Palm Beach County ranks first in the State in the amount of agricultural cropland acreage and farm income cash receipts from agricultural products. In 1994, farm income for Palm Beach County was just under $1.2 billion.

Government Sector

The state and local government sector in the Clewiston market area (H/G+) accounts for approximately 17% of the aggregate region total employment as Table XIV.12 demonstrates. This is roughly equivalent to the state and local government employment in the Remaining Heartland Economic Region, which accounts for 18.7% of the total employment.

Table XIV.12
The Role of State and Local Government as Employer

Area	State and Local Govt. Employment	Total Employment (incl. Farm & Govt.)	Concentration of Govt. Employment
Clewiston (H/G+)	3,205	18,427	17.39%
R. Heartland	9,759	52,222	18.69%
Panhandle Comp.	6,523	18,942	34.44%

+ Inclusion of Immokalee area data provides a rough approximation of presently unavailable NW Palm Beach data.
Source: Florida County Profiles, 1999 from Enterprise Florida, and Year 2000 Dun & Bradstreet

Labor Force Characteristics

A look at the market area labor force is required for any assessment of the performance of the local economy and future needs. Table XIV.13 compares high school skills for job readiness with state-wide rates. The labor force in the Clewiston market area has a lower proportion of high school graduates with the Heartland portion having higher dropout rates. Clewiston market area scores on the Florida Comprehensive Assessment Test (FCAT) were all lower than those overall rates for the State of Florida. Prospective new businesses want not only the promise of a ‘low cost-of-doing business’, but also access to a deep and amply skilled labor force as well.

Table XIV.13				
Clewiston Market Area High School Skill Job Readiness, 2002-03				
Area	**'02 4-Year Grad. Rate**	**'02 Dropout Rate**	**'03 FCAT Reading Passing Rate**	**'03 FCAT Math Passing Rate**
Hendry	52.1%	4.9%	39%	59%
Glades	54.7%	7.2%	56%	67%
Palm Beach	66.9%	2.6%	53%	70%
Florida	67.9%	3.2%	58%	73%

Source: Bureau of Economic and Business Research, University of Florida, 2003

For example, City officials note that Wal-Mart did not locate their new 800,000 sq. ft. regional distribution center in the Clewiston commutershed because not only were there an insufficient number of persons in the labor force, but equally important, there was not enough sufficiently educated labor force or the training capabilities to provide enough workers.

Lack of a sufficiently educated labor force is not unique to the Clewiston commutershed. On the contrary, this is a growing problem throughout the United States because of two great changes that started in the late 1970s. Noted economist and former Secretary of Labor Robert Reich notes succinctly:

> "The emergence of new technologies like computers, and the knitting together of all the world's economies have been boons to well-educated professionals and executives whose problem-solving abilities are in even greater demand. But these same trends have created disasters for poorly educated factory workers, who can now be easily replaced. The whole economy has been transformed from high-*volume* production (based on repetitive tasks) to high-*value* production (based on thought and knowledge). Only those with the right skills are flourishing."

These great changes in the world economy have made some workers more valuable and secure than ever, while pushing others—even those with skills that were until recently regarded as highly valuable—to the margins. A recent *Business Week* report notes new research by economists at MIT and Harvard which conclude that the key factor is whether a job can be "routinized," or broken down into repeatable steps that vary little from day to day. Such a job is easier to replace with clever software or to hand over to a lower-paid worker outside the U.S. By comparison, the jobs that will pay well in the future will be those that are hard to reduce to a recipe.

These attractive jobs—from factory floor management, sales, teaching, and the professions—require flexibility, creativity, and lifelong learning. They generally also require subtle and frequent interactions with other people, often face to face. The report concludes that the good news is that a substantial majority of the jobs in the U.S.

economy are non-routine. Without question, an effective economic development program must include labor force training and retraining programs for prospective occupations in central Florida that require flexibility, creativity, and people skills. The objective is to raise permanent family incomes and average wages in the Clewiston market area.

Table XIV.14 indicates that across all private-sector industries, the labor force in Hendry and Glades counties have comparable average wages that are low in comparison to Florida, except for farming/agriculture in Glades, and much lower than the wages in Palm Beach County, except for wholesale trade in Glades.

Table XIV.14
Average Wages by Industry and County, 1998

Industry	Hendry	Glades	Palm Beach	Florida
Farming/Agriculture	$17,470	$23,897	$31,834	$18,066
Construction	$25,263	$22,954	$31,019	$29,943
Manufacturing	$46,640*	n/d	$50,698	$36,232
Transportation/Utilities	$27,482	$34,320**	$38,982	$37,106
Wholesale Trade	$32,157	$46,850*	$42,641	$41,000
Retail Trade	$14,523	$11,231	$18,345	$17,836
Finance, Ins.& R.E.	$21,680	$17,365	$52,982	$40,601
Services	$18,161	$13,427	$30,398	$27,980
Private Industry Avg.	$21,931	$21,230	$31,834	$28,510
State & Local Govt.	$26,513	$22,874	$34,152	$32,313

*Estimate from 1998 Wage & Salary in Florida County Perspectives
**Estimate from 1997 Wage & Salary in Florida County Perspectives
Source: IMPLAN zip-code data for 1998

The better paying private industries in the Heartland Region area are *Wholesale Trade* and *Transportation/Utilities* which is likely due to trucking services. However, *Manufacturing, Finance, Insurance, & Real Estate* are also among the higher-paying sectors in Palm Beach County. State and local government sector plays a significant role, both in terms of number employed and an average pay scale that exceeds average private sector wages throughout the Clewiston market area.

Price Level Index in the Clewiston Market Area

Table XIV.15 indicates how the cost of living varies in the Clewiston market area. The two Heartland Region counties rank lower than the state average in every category except for *Food* in Glades County, which is higher. Conversely, *Food* is the only category in Palm Beach County which ranks lower than the state average.

Table XIV.15							
Price Level Index in the Clewiston Market Area, 2002							
(population-weighted state average = 100)							
County	**Index**	**State Rank**	**Food**	**Health**	**Housing**	**Other**	**Transportation**
Hendry	97.16	12	98.24	94.98	95.73	98.49	98.58
Glades	95.83	17	100.30	94.44	92.14	96.84	98.63
Palm Beach	106.95	4	99.72	102.39	112.92	106.69	103.69

Source: Bureau of Economic and Business Research, University of Florida, 2003

Labor Force Housing in the Clewiston Market Area

The condition of existing housing stock, demand, and growth in the Clewiston market area has been described in related documents. These include the Housing Elements of this Clewiston Comprehensive Plan and Evaluation and Appraisal Report, the Hendry County Comprehensive Plan and Economic Development Strategic Plan, the Glades County Enterprise Zone Strategic Plan, and the Palm Beach portion of Affordable Housing in the Treasure Coast Strategic Regional Policy Plan. Those findings most relevant to labor force housing for economic development are summarized in Table XIV.16.

Table XIV.16							
1990-1996 Estimated Housing by Type and Total Housing Demand							
	Single Family	**Multi-Family**	**Mobile Home***	**Total**	**Housing Demand 2000**	**2005**	**2010**
Clewiston	1,406	578	468	2,454	6,575	6.869	7,200
Total Hendry	5,615	833	6,074	12,522	17,0666	19,168	19,986

*Household estimates based on 1990 Census and updated with Building Department records.
Source: Shimberg Center for Affordable Housing, at the University of Florida, 1997

By the late 1980s, 690.7 acres of land in Clewiston or 23.6% of the City land area were developed for residential use. There were 332 spaces in mobile home parks and one group home. The Housing Element declared the private sector to be the only supplier of housing in Clewiston, and the Element found that low- and very low-income persons will continue to have difficulties finding affordable housing.

Clewiston has not kept pace with the housing growth rate in Hendry County. Table XIV.16 indicates that by 1996, Hendry County had 12,522 housing units. Of these units, over 50% were mobile homes. This percent has increased dramatically since 1970 when only 16.6% of the housing stock was mobile homes. Over the ten year period between 1980 and 1990, housing construction added 4,744 housing units to the unincorporated area of the County. Of these units, 74% (2,802) were mobile homes, 25% (960) were traditional single-family homes, and less than 1% were multi-family units.

Future Hendry County housing projections provided by the Shimberg Center indicate that by 2010, there will be drastic shortages of renter-occupied affordable housing units in the $7,471 to $12,452 median household income range and also shortages of renter-occupied and owner-occupied housing in the $50,000 and up median household income bracket. City and Chamber of Commerce officials report they regularly receive inquires from Palm Beach County coastal area residents looking for alternative residential relocation opportunities in the immediate Clewiston area. They conclude that a market presently exists for upscale and retirement single family housing at an absorption rate of 50 units per year.

In Glades County, the 1995 Shimberg Center Affordable Housing Needs Assessment indicates that the highest percentage of owner-occupied households in the lower income levels paying more than 30% of their income for monthly housing costs was 29.4% for incomes of less than $10,000, and 25.8% for incomes between $10,000 and $19,000. The overall housing demand in the County by 2010 is 8,505 units; of which 4,731 are for owner-occupied units; 1,669 for renter-occupied units; and 1,649 for farmworker or rural seasonal units. The Assessment indicates that the County has a deficit of only 91 affordable housing units. However, a sizeable number of the housing units appear to be in substandard condition. According to the latest U.S. Census, about 9% of the total number of housing units is classified as substandard, and 3.8% lacks either plumbing or kitchen facilities.

Palm Beach County is a study in contrasts. In 1994, only 24.3% of the total 65,437 migrant residents lived in HRS permitted facilities. In 1990 the median value of housing units was $98,400 with 57% owner-occupied, 22% renter-occupied, 11% seasonal, 5.7% mobile homes and the remainder unclassified. Only 39.5% of the County housing units were single-family detached.

From these various sources at least two consistent economic development housing issues emerge for the Clewiston market area. Not only will the area lack enough suitable housing for the lower income segment of the labor force, it may also lack suitable housing for the higher than local average income employees that an effective economic development program would hope to attract. They could be forced to commute from outside the Clewiston market area, where they would spend a sizable portion of their disposable income. In fact, the Executive Director of the Clewiston Chamber of Commerce recently noted that due to the lack of available housing, new upper management employees of U.S. Sugar do not live in or near the City.

Labor Force Availability

The draft Hendry County Comprehensive Plan Economic Element cites an August, *2002 Labor Force Availability Study* conducted by Schulman, Ronca & Bucuvalas, Inc. under the auspices of the Hendry County Economic Development Council and the Hendry County Board of County Commissioners. Major findings of the study are:

- There are 10,057 working households in the County.
- The average working household includes 2.2 workers.
- Thirty percent of the workers who responded in the study group would definitely/probably take a job in Hendry County that paid an hourly wage similar to what they currently earn; 65% said the opposite.
- Eighty seven percent of Hendry County workers are employed; 9% part-time.
- Forty one point two percent work in agriculture; 18.7% work in government.
- The median age for working adults is 29.5.

*Respondents were from Fort Myers, East Fort Myers, Buckingham, Alva, LaBelle, Felda, Bunker Hill, Immokalee, Harlem, Clewiston, Big Cypress, and Belle Glade.

Clewiston Space for Business and Employment Expansion

The latest (1997) Clewiston Comprehensive Planning Evaluation and Appraisal Report (EAR) does not appear to emphasize business and employment expansion. Aside from noting an amendment to accommodate a Wal-mart store (which are criticized for not circulating much money in a local economy) the EAR does not quantify the amount of space available for commercial or industrial expansion except to observe on page 28: "It is unlikely that there will be a significant increase in the acreage or location of industrial land in the foreseeable future."

The 1999 Hendry County Economic Development Strategic Plan compares the projected 2010 population-driven land use requirements with acreage designated on the Future Land Use Map for the unincorporated area. Of a projected need for an additional 734 acres of Commercial land, a total of 1,745 acres is designated, and of a projected need for an additional 267 acres of Industrial, 3,563 acres is designated. However, the report does not indicate what portion of the designated acreage is vacant or where it is located within the County.

The dominant land use in Glades County is agriculture (sugar cane and cattle grazing) which accounts for approximately 65 % of the total land uses. Approximately 65% of the land in the County is owned by Lykes Brothers Inc., and another 20% is controlled by two other businesses. Glades lacks medical services. The County has no hospital, only a health center, and has difficulty attracting and keeping a private doctor. The fact that 85% of the land in the County is controlled by three large businesses, restricts the ability of the County to plan for business development.

Retail businesses and other services within the County are very limited. There are grocery and convenience stores, however, very few retail outlets or chains operate in the County. The City of Moore Haven has two bank branches and a number of fast food franchises such as Kentucky Fried Chicken, Burger King, and Subway. A few local restaurants exist, but choices are generally limited. The nearest location of a greater variety of goods and services is Clewiston.

But Clewiston has lacked available expansion area. Participants at a recent economic development workshop generally concurred that U.S. Sugar owned or leased most of the land around Lake Okeechobee from Pahokee to Airglades Airport. The Corporation reportedly has not considered making any of these parcels available for urban development in the past. More recently however, it has been reported that several roughly 100 acre parcels between the City limits and Airglades Airport are no longer leased by U.S. Sugar. If so, a westerly direction of City expansion may be possible.

The City Manager also reports meeting several times with U.S. Sugar Officials to discuss a proposed business park and other development issues. The officials were reportedly open-minded and have expressed their willingness to work with the City to develop an 80 acre business park, but first the City must give them a plan to work with.

Clewiston Infrastructure for Business & Employment Expansion

The 1997 Clewiston Comprehensive Planning EAR notes several Traffic Circulation needs that have Economic implications:

- "Annual monitoring of traffic volumes on U.S. 27 is recommended in order to assess and continually project the need for future traffic improvements to accommodate both local and through traffic." (In September of 2003 on Map 1, the State Department of Transportation identified U.S. 27 and SR 80 as "Strategic Intermodal System Highway Corridors", and U.S. 441, the South Central Florida Express railroad, and the Okeechobee Waterway, as "Emerging Corridors", presumably giving improvements higher priority),

- "As additional development occurs in the extreme western portion of the City, an additional collector north-south roadway corridor should be established", and

- "At the time a decision is made regarding the future of the airport (now abandoned), coordination of land use, community development, and traffic engineering should be implemented to protect the environment and compatibility in land use, traffic circulation, and air safety".

The sewage treatment plant operated by the City of Clewiston was built in 1987. The Comprehensive Plan element predicted the eventual need for a new spray field to address growth needs after 2001, and suggested that planning for the project should start by 1997. A 1978 consulting engineers study estimated that the Hendry County operated landfill at Pioneer Plantation used by the City had a design capacity of 30 years. The Plan identified a long-term need for a regional facility to succeed the existing County facility.

The Clewiston Drainage District was created in 1924 to protect the City and neighboring areas from flooding. A water management plan has been in place since 1975 which include portions of the City Code relating to flood protection.

Strengths, Weaknesses, Opportunities, and Threats

Based on a 2006 regional SWOT analysis, this section suggests Clewiston strengths, weaknesses, opportunities and threats to be faced in evaluating its relative competitive position in the future regional economy. Additionally, on July 20, 2004 the City held a local Participation Economic Forum that seemed consistent with the outcome of the earlier SWOT analysis. The recent Economic Research Group, Inc.'s targeted industry study of Glades and Hendry Counties in the southwest Florida economic region presents a unique opportunity for Clewiston. Using this format, the City's competitive position may be more easily and completely evaluated, and unique market niches identified for choosing economic development priorities, and Goals, Objectives, and Policies. Based upon these choices, a more detailed economic development work program and budget may be created. The evaluation uses the following factors:

1. Location and Access
2. Economic Base
3. Workforce, demographics, and housing
4. Supply of Industrial and Commercial Sites
5. Business Climate
6. Tourist Attractions and Hospitality Infrastructure
7. International Trade

Clewiston Location, Access, and Communications Infrastructure

Strengths	Weaknesses
Proximity to major population centers	Poor west access on Route 80
Good north-south access on US-27	
Heavy traffic volumes through the area	Lack of services and facilities for heavy truck traffic through the area
Good national and international air service	Poor public transit for low income workforce
General aviation airports	
Existence of Foreign Trade Zone at Palm Beach International Airport.	No high-speed telecom infrastructure
Class III rail freight service connecting to Class I rail operations to all points north	

Climate, Terrain, and Land Use

Strengths	Weaknesses
Tropical climate	
Strong agricultural base	Uncertain outlook for agricultural crops
Large land holdings facilitate large site assembly	Lake Okeechobee tourism adversely affected by drought

The area enjoys a tropical climate, being below the Frost Belt with pleasantly mild to hot weather year round. Nearly half of the study area is covered by swamps and wetlands vegetation, rendering much of it un-developable due to regulatory constraints. Some 80% of the land area is devoted to agriculture. The farms here are the largest in the state, averaging 1,500 to 2,000 acres.

Economic Base

Strengths	Weaknesses
Rapidly-growing employment base and population	Over-dependence on agriculture needs
Wealthy agricultural area	Underdeveloped fire and construction sectors
Growing service, retail/wholesale trade distribution & transportation sectors	Uncertain outlook for agricultural base, and competition from NAFTA countries
Well-developed agricultural services sector	Citrus jobs are threatened by mechanization.
Well-developed distribution network	Seasonality of agriculture and tourism
Strong food processing sector	
Florida Agricultural Promotional Campaign	
Commuting distance to east coast employment	

Labor Force, Demographics, and Housing

Strengths	Weaknesses
Hardworking, manual work force provides a visible labor pool.	Low-skilled workforce
High level of food processing skills	Sparse population means shallow labor pool
Most of the area is commuting distance from coastal employment centers.	Hard to get highly qualified people to live in the area
Growth in % of retirees with higher discretionary income	Shortage of rental housing and higher income housing for managers and retirees
Poor, but improving supply of low cost housing	Negative image from high-visibility mobile home parks and scattered sites
	Lack of dormitories for migrant farm
26% of Labor Force in surrounding	65% of Labor Force in surrounding

counties would take a job in Hendry County that paid 10% more if they had to drive 20 miles or less	counties would not take similar paying jobs in Hendry County.
Cost of living 10% lower than east coast counties and 3% lower than the state index	

Industrial and Commercial Areas

Strengths	Weaknesses
A Central Business District is somewhat established in Clewiston.	No sites for industry designated in City, Business and Industry lack business park settings.
	Lack of initiatives for improvement of existing industrial areas and for retention of industries
Access to funding for water and sewer and other infrastructure	Lack of Community Redevelopment Agency

Tourist Attractions & Hospitality Infrastructure

Strengths	Weaknesses
High traffic volumes on US27	Comparatively few hotel rooms
Easy day trip from major population centers to the east, west, and north.	Limited view shed & access for non-boating visitors to Lake Okeechobee limits appeal to boating and fishing enthusiasts.
(Regional) Eco-tourism opportunities around the lakes and river.	Periodic droughts make Lake Okeechobee a volatile tourist base
(Regional) Abundance of RV and camp sites	Lack of waterway dredging & maintenance
Lake Okeechobee & the Big Water Heritage Trail	Seasonality
Intercoastal Caloosahatchee River-Lake Okeechobee Waterway	
Appropriate workforce for many jobs in tourism	

Land Use & Governmental Support

Strengths	Weaknesses
Relatively low land costs compared to Palm Beach and Lee County.	Land available for residential and commercial development is limited due to lack of diversity in ownership.
City of Clewiston is small size city with minimum bureaucracy.	Land Development Regulations are antiquated and need updating.

Business Climate & Incentives

Strengths	Weaknesses
Designation as Rural Area of Critical Concern	No emergency funds, loans, or other measures to relieve impact of drought on Lake-dependent businesses
FHREDI Incentives & USDA housing assistance program eligibility	Uneven inbound & out bound freight volumes make for higher freight costs in the study area
Hendry County has a State Enterprise Zone	Local Retail Sales Tax Option of 1% in Hendry County
City shows initiative in pursuing economic grants including infrastructure.	High Property Tax Rate in Hendry County
	Lack of readied, skilled workforce
Eastern Hendry County shares Federal Enterprise Community Status	Shortage of staff to administer grant and loan programs.
Low state tax rates – good business climate	
Availability of emergency loan funds (through SBA & State) for businesses affected by drought	

International Trade

Strengths	Weaknesses
Existence of Foreign Trade Zone at Palm Beach International airport	Limited export-oriented business base
Good north-south access on US-27 to Port of Miami	Poor road access via SR 80 to SW Florida International Airport
Study area regions are within 60 to 90 miles of a deep water port	
Florida's current strong export foothold in Latin America	Citrus imports may compete with local producers for same markets
State government is aggressively pursuing the FTAA for 2005	
Freight rail infrastructure	
Established warehousing & distribution services	

Opportunities

Based on the Clewiston economic performance analysis and the strengths and weaknesses, a number of realistic opportunities for economic development can be identified. It appears that there are opportunities to develop the following industries: residential development, tourism, distribution, foreign trade, trucking services, food processing, and the construction industry.

Residential Development Initiatives

One of the foremost problems in Clewiston is the shortage of quality housing for families at virtually all income levels. As well as addressing the shortage of housing, a residential development initiative should also focus on upgrading if not redeveloping older, hurricane damaged and poorly maintained mobile home parks, which impart a negative image of the town and the surrounding areas. Initiatives aimed at improving the supply of lower and middle income and retirement housing should receive priority.

Middle Income Housing

The population of Hendry County is growing rapidly, particularly in the western area as the suburbs spill over from Fort Myers and Naples. Median housing prices in these two cities are now well over $100,000 to $300,000 respectively. Developers catering to families looking for more space and better value for money are looking to the east, now that property values have exceeded levels affordable by most middle-income families.

Sites west of Clewiston should be identified for development of middle-income housing – both rental and for-sale and for potential seasonal residents. Middle income housing development will alleviate the area's demographic imbalance, contribute to economic growth, and will help resolve the shortage of skilled, educated workers.

Lower Income Housing

The large number of older, unattractive mobile home parks in highly visible locations in towns and cities blight the image of the study area. There is a national trend toward acquisition and renovation of existing older parks with facilities, services, signage, and site improvements to bring them into line with current standards for manufactured housing communities. The consultants have identified a number of planners and developers who are active in acquiring, renovating, and managing older home parks in order to upgrade them to current standards. The possibility of using federal and other funds and resources (such as Habitat for Humanity) to accomplish the goal of upgrading the supply of existing rental and for sale mobile homes for lower income seasonal and year-round workers should be explored.

Retirement Communities

The retirement community is an obvious market for Clewiston. While the retired population does not contribute as much as the working age population does to tax revenues, they often have more discretionary income to spend from nest eggs and transfer payments. The locational amenities of Clewiston are attractive to retirees and will drive housing investment in and of itself. The retired population also drives demand for medical services and a more concentrated retirement community in the Clewiston market area may provide the critical mass to evolve the Allied Health/Biomedical industry for the study area.

Tourism Development

Tourism, the world's top growth industry, is Florida's main economic engine. A recent survey showed that about half of the visitors to the Heartland Economic Region are from out-of-state and 12% are from Europe. There are opportunities to develop a number of segments of the tourist trade, including: day trips from the coastal resorts, the passing north-south traffic along State Highway 27, the European market, and eco-tourism.

Passing Traffic

The use of US 27 for trips between coastal population centers and Orlando should be marketed to both domestic and international tourists. Nationally, there has been an increased interest among tourists in exploring the less-traveled routes through the country. More tourists, both foreign and domestic, are looking for glimpses of local life not accessible along the interstate highways. Route 80 is now being marketed as the "Sweet Route" in a similar fashion to Alligator Alley to the South and the Cracker Trail to the North. Europeans are particularly drawn to this type of experience and can be made the target of a campaign for tourists wanting to visit Miami, Orlando, and the area between the two. Day-trippers based in the resorts on the east and west coast are another target.

Eco-Tourism

Although the Clewiston market area has a shortage of good hotel rooms, it has seven 3 and 4 star campgrounds with 1420 comparative. Nearly 800 campsites are in Hendry County and Glades County has over 600 sites. The success of Billy Swamp Tours at the Big Cypress Seminole Indian Reservation in Southern Hendry County illustrates the opportunities for eco-tourism development. The main target would be vacationers and seasonal residents based in the coastal resorts.

Other fascinating eco-tourism opportunities include exploring the wilds of Fisheating Creek and boating on the Caloosahatchee River. The River, together with Lake Okeechobee and the St. Lucie Canal form an intercoastal waterway connecting Fort Myers with Port St. Lucie on the East Coast. In Glades County, the re-opening of Fisheating Creek will support related attractions, such as the two Alligator Farms and the Cypress Knee Museum, comprising an attractive eco-tourism package.

Distribution Industry

Clewiston's proximity to major population centers, its low cost of land, and the presence of a significant volume of trucking business in the area (due to the citrus crop), make it a natural locus for development of the distribution and warehousing industries. To support this effort, the widening of SR 80 should to become a priority. The road is now 2 lanes between Hickey Creek to US 27.

Foreign Trade Development

Palm Beach International Airport seeks to expand the role of the free trade zone to that of an international gateway for produce and other products shipped to and from the Caribbean Islands. A major goal is to be positioned for a leading role in Cuban trade when that market opens up. Opportunities to package goods and produce transported to and from the Caribbean should be the focus of a special study to define the potential demand and to develop a practical means of tapping it.

Trucking Industry Facilities

A number of major truck stop operators have expressed interest in sites in the Clewiston Market area. A market study could gauge the feasibility of developing a truck stop in the area. Other support facilities for truckers like truck washing, parts, repairs, hotels, and communication facilities should also be considered. This initiative would be undertaken in conjunction with the widening of SR 80. An alliance of independent local truckers is reportedly pursuing the establishment of a truckers' cooperative to compete for business from large food corporations. Once established, this organization should be included in the planning process.

Food-Processing

As noted above under the description of the Clewiston market area, there is an imminent threat of job losses in citrus picking. This process will free a significant labor pool for employment in value-added industries. At present, the area has eleven times more jobs in food processing that the state average, due mainly to orange juice manufacturing and sugar milling. Clewiston's strengths in food processing and its experienced labor pool should be built upon to attract other processors adding value to crops grown locally, as well as those imported from the Caribbean and other Latin American markets.

Construction Industry Training

The sustained growth in tourism and expansion of housing would combine to demand skilled construction workers. The multi-billion dollar Everglades Restoration project will create some demand for skilled earthmovers, pipe layers, and carpenters. The area's hardworking manual labor force offers significant potential for training in these skills. Construction industry development should be supported. A parallel effort to support, expand, and screen existing industrial areas (such as the one just outside of downtown Clewiston with outdoor storage areas for plant, materials, and equipment could be developed as part of a business retention effort.

Agricultural Diversification

There are several viable and likely transition paths for the farm working population to mitigate the problem of seasonal work and for farmers to supplement their income. Diversification of the agricultural sector extends beyond choosing crops beneficial for improving farm budgets to developing opportunities to transfer the skills of the farm working population to related activities in the *Agricultural/Forestry Fishery services* sector. Probable 'skills-transfer' activities for development include turf management, sod farming, ornamental nurseries and landscaping. This can improve both skill and income development for farm workers as well as provide non-seasonal alternatives for manual laborers. For farm proprietors or managers there are some crop options/growing alternatives (*e.g.* organic, fair labor practices) and marketing techniques (*e.g.* branding) that can increase the extent of value-added production of South West Florida farms.

Additionally, there are several factors that warrant examination of developing additional fresh-water aquaculture farms for Hendry and Glades counties. Ocean Boy Farm, based in Clewiston with a processing plant at the Airglades Industrial Park, started its white shrimp farming operations in late 1999. The business includes post-larval growing, harvesting, processing and direct marketing of shrimp to the Publix chain of grocery stores in the southeast U.S. High-value aquaculture products (*e.g.* aquatic plants, ornamental fish) are well suited to small farms but require access to international air service. There is also a risk of cold temperatures with external fish/shrimp ponds and initial capitalization can be expensive. The preconditions of an ideal location for an aquaculture enterprise would include:

- good market reach
- good access
- good weather
- zoned agricultural land

- lower per acre costs than coastal or metropolitan area
- less restrictive water constraints

However, the largest challenges facing aquaculture come from the marketplace. The costs of production can easily make farm-raised products sub-competitive to dock-side catch and volume must be high for a customer to switch suppliers.

Threats

The following issues represent current or evolving threats to the regional economy and the Clewiston market:

- Lack of available developable land except to the west
- Mechanization of citrus harvesting & idling of significant labor force
- NAFTA competition
- Brazilian oranges
- Low-value added agricultural commodities prone to world market fluctuations
- Out-migration of young labor force
- Sustained high proportion of residents that are unemployed or under-employed if skills gap not remedied

Balancing agriculture as "best" land-use and the need for emerging residential development – acknowledging that pre tax dollar paid, households require greater provision of public services.

Setting Guidelines and Priorities for Action Programs

As introduced in this Comprehensive Plan Element, the overall goal of successful economic development is to improve citizen's quality of life by increasing their per capita disposable income. Further, maximizing opportunities requires a diverse and stable economy. Basically, this goal can be met through achieving at least three objectives:

1. Attract private and public activities that import and circulate money in the local economy by exporting goods and services to the regional market area and beyond;
2. Attract private capital investment to broaden the tax base for providing cost-effective public services; and

3. Attract private and public activities that create for citizens full-time permanent jobs that pay better than existing average local wages.

However, achieving the preceding basic objectives requires an available trained labor force. The City of Clewiston must first start achieving the basic objective of an educated labor force in order to progress toward attainment of the related economic objectives. The following Goal statement, measurable progress Objectives and Policies to guide actions (GOPs) were tailored to Clewiston needs from several supporting studies and community meetings and specific recommendations from the Clewiston Planning and Zoning Board.

All these GOPs are intended to provide a framework for implementing more detailed existing and proposed action programs in Clewiston that also supplement on-going County and regional efforts.

Economic Goals, Objectives and Policies

Goal 1: Achieve and maintain a diversified, stable economy and positive business climate to improve the quality of life by increasing per capita disposable income in the Clewiston market area.

Objective 1.1: Increase labor force membership completing development and training/retaining programs for those prospective better-paying occupations in Central Florida requiring work flexibility, creativity, people skills, and life-long learning.

Policy 1.1.1: Identify central Florida labor force needs and trends as a means with which to target training objectives and programs.

Policy 1.1.2: Work with school districts in the Clewiston commutershed to reduce dropout rates, increase graduation rates, and provide technical training and continuing education programs for targeted businesses.

Policy 1.1.3: Working with local businesses through the Chamber of Commerce, promoting direct involvement in curriculum development for career training/retraining to improve labor force skills, and enhance employability.

Policy 1.1.4: Assist the School Board and the business community in the development of a "Working English – Trade Skills" pilot program to improve the language skills and to prepare agricultural workers for jobs in other businesses.

Policy 1.1.5: Working with the School Board to support the use of a one-stop career training center and coordinate communications with various colleges, universities, and other post-secondary education institutions to provide effective delivery of services, and to better identify "gaps" in resources.

Policy 1.1.6: Cooperate with State, County and the surrounding agencies to reduce the out-migration of trained/retained labor force members.

Objective 1.2: Through direct involvement expand the amount and diversity of private capital investment stimulated and attracted in order to provide competitive and cost-effective public services.

Policy 1.2.1: Conduct an annual business profile survey to help determine the overall health of local businesses and industries, and their needs. This survey will in part help to determine the potential to attract customer or supplier businesses which could strengthen or enhance existing businesses.

Policy 1.2.2: Establish a business retention program to stabilize and expand the tax base and permanent full-time employment by expediting public services, diversification away from exclusively agricultural products, and developing a center of excellence in a food processing market "niche".

Policy 1.2.3: Establish a method to improve the supply of housing for a better-paid labor force by working with existing and potential local employers, contractors, builders and lending institutions.

Policy 1.2.4: Establish and begin implementation of an Economic Development Action Program based on the draft outline prepared by the City Manager dated September 10, 2003, including the establishment of a State Enterprise Zone designation.

Policy 1.2.5: Cooperate with Hendry County to limit residential tax burdens while funding facilities and services needed for economic development by:

a) requiring new development to pay the cost of facilities and services needed to support economic growth through applying appropriate user fees and impact fees; and

b) documenting the generation of revenues and types of expenditures from fees collected from new development.

Policy 1.2.6: Review economic development proposals for impacts on the adopted level of service standards.

Policy 1.2.7: Coordinate with public and private service providers to ensure that adequate infrastructure is provided to areas designated for commercial and industrial development in the Future Land Use Element and Capital Improvement Element.

Policy 1.2.8: Work cooperatively with related agencies to assure continued viability and cost effectiveness of the Hendry Regional Medical Center.

Policy 1.2.9: Annually update the inventory of available sites along with appropriate information such as ownership, utilities, land use, zoning, etc. and update on an annual basis using in part the inventory identified in Policy 2.1.

Objective 1.3: Increase the number of private and public employers that create permanent full-time jobs paying at least 20% higher than the 1998 average wages by industry category in the Clewiston commutershed.

Policy 1.3.1: Conduct a feasibility, timing, and size study of an attractive and competitive business park either within the present or annexable City area.

Policy 1.3.2: Establish clear and reasonable development standards for use when reviewing and approving industrial and commercial development locating in existing or new business parks.

Policy 1.3.3: Continue to join forces and cooperate with county and regional business recruitment programs in order to improve cost-effectiveness and economies of scale in a more detailed Economic Development Action Program.

Policy 1.3.4: Cooperate with State and adjacent local governments to investigate the feasibility of a small business incubator program.

Policy 1.3.5: The City shall re-examine and modernize any outdated Land Development Regulations for Industrial/Business/ Commercial uses.

Objective 1.4: Increase the number of businesses that import and insert money into the Clewiston economy by exporting goods and services outside the City and beyond through recruitment including the provision of incentives.

Policy 1.4.1: Evaluate further opportunities for distribution and warehousing promoting economic diversification that would exploit the central location of Clewiston between coastal population/market centers, and develop capacities required for potential international trade.

Policy 1.4.2: Continue promoting the tourist destination features of Clewiston as a base for an entrepreneurship development program utilizing the Tourist Development Program effort, creating entry-level jobs that provide transitions away from part-time low-wage agricultural employment to permanent, better-paying service businesses.

Policy 1.4.3: Cooperate with the Clewiston Chamber of Commerce and the Hendry County Economic Development Council on targeted new business and technology.

Policy 1.4.4: Coordinate with the Clewiston Chamber of Commerce by keeping a current list of probable new business and industry entrants to target based on Enterprise Florida Key Industries and Technologies that fit the Clewiston location and emerging labor force capabilities.

Policy 1.4.5: Develop and include in all marketing an incentive program which includes, as found appropriate, support in site acquisition, extension of utilities, enhanced permit processing and supporting funds and grants provided by other governmental agencies.