MEMORANDUM

Agenda Item No. 11(A)(10)

TO: Honorable Chairman Anthony Rodriguez
and Members, Board of County Commissioners

DATE: November 17, 2026

FROM: Geri Bonzon-Keenan
County Attorney

SUBJECT: Resolution directing the County Mayor to take certain actions to facilitate the development of certain County-owned property designated as Spaceport Territory and located in the vicinity of the Homestead Air Reserve Base (HARB) as an aerospace industry hub and other compatible industries; directing the County Mayor to prepare solicitations for contracts to effectuate the purposes of this resolution and bring such solicitations back to the Board for approval along with recommendations for funding sources; requiring reports; and suspending rule 5.06(a) by a two-thirds vote of the Board members present as related to the preparation and enactment of ordinances and resolutions

The accompanying resolution was prepared and placed on the agenda at the request of Prime Sponsor Vice Chairman Kionne L. McGhee.

for
Geri Bonzon-Keenan
County Attorney

GBK/gh

MEMORANDUM

(Revised)

TO: Honorable Chairman Anthony Rodriguez
and Members, Board of County Commissioners

DATE: November 17, 2026

FROM: Geri Bonzon-Keenan
County Attorney

SUBJECT: Agenda Item No. 11(A)(10)

Please note any items checked.

_____	**"3-Day Rule" for committees applicable if raised**
_____	**6 weeks required between first reading and public hearing**
_____	**4 weeks notification to municipal officials required prior to public hearing**
_____	**Decreases revenues or increases expenditures without balancing budget**
_____	**Budget required**
_____	**Statement of fiscal impact required**
_____	**Statement of social equity required**
_____	**Ordinance creating a new board requires detailed County Mayor's report for public hearing**
_____	**No committee review**
✓	**Requires more than a majority vote (i.e., 2/3's present ✓, 2/3 membership ____, 3/5's ____, unanimous ____, majority plus one ____, CDMP 7 votes (majority of membership) ____, CDMP 2/3 members present but not less than 7 votes (majority of membership) ____, CDMP 9 votes (2/3 membership) _____) to approve**
_____	**Current information regarding funding source, index code and available balance, and available capacity (if debt is contemplated) required**

Approved _____ Mayor
Veto _____
Override _____

Agenda Item No. 11(A)(10)
11-17-26

RESOLUTION NO. _____

RESOLUTION DIRECTING THE COUNTY MAYOR OR COUNTY MAYOR'S DESIGNEE TO TAKE CERTAIN ACTIONS TO FACILITATE THE DEVELOPMENT OF CERTAIN COUNTY-OWNED PROPERTY DESIGNATED AS SPACEPORT TERRITORY AND LOCATED IN THE VICINITY OF THE HOMESTEAD AIR RESERVE BASE (HARB) AS AN AEROSPACE INDUSTRY HUB AND OTHER COMPATIBLE INDUSTRIES; DIRECTING THE COUNTY MAYOR OR COUNTY MAYOR'S DESIGNEE TO PREPARE SOLICITATIONS FOR CONTRACTS TO EFFECTUATE THE PURPOSES OF THIS RESOLUTION AND BRING SUCH SOLICITATIONS BACK TO THE BOARD FOR APPROVAL ALONG WITH RECOMMENDATIONS FOR FUNDING SOURCES; REQUIRING REPORTS; AND SUSPENDING RULE 5.06(A) BY A TWO-THIRDS VOTE OF THE BOARD MEMBERS PRESENT AS RELATED TO THE PREPARATION AND ENACTMENT OF ORDINANCES AND RESOLUTIONS

WHEREAS, certain County-owned properties in the vicinity of the Homestead Air Reserve Base (the "HARB") have been designated by the Florida Legislature as "Spaceport Territory," as described in Section 331.304(6), Fla. Stat. (2024), and as shown in Exhibit A (hereinafter described as the "County-owned Properties"); and

WHEREAS, as articulated in further detail herein, this Board wishes to take steps and provide certain direction to the County Mayor or County Mayor's designee, with the goal of facilitating the development of all or some of these County-owned Properties as an aerospace industry hub; and

WHEREAS, the HARB was realigned in 1994 pursuant to the federal Base Realignment and Closure process, and portions of the former base were subsequently made available for economic redevelopment; and

WHEREAS, on July 13, 2004, this Board adopted Resolution No. R-909-04, authorizing an Economic Development Conveyance Agreement between the Secretary of the Air Force, on behalf of the United States of America, and the County, for the transfer of approximately 601 acres of surplus property at the former Homestead Air Force Base to the County for economic development purposes; and

WHEREAS, the purpose of the Economic Development Conveyance was to promote economic development through job creation and new business development in the area surrounding the HARB, and the County has subsequently used portions of the property to advance economic development in South Miami-Dade; and

WHEREAS, Miami-Dade County continues to own property originating from the former Homestead Air Force Base – the County-owned Properties – that may present an opportunity to attract additional private investment, create jobs, expand the County's industrial base, and support the continued economic development of South Miami-Dade; and

WHEREAS, during the 2024 legislative session, the Florida Legislature designated as Florida Spaceport Territory certain real property formerly within the boundaries of Homestead Air Force Base, including federal property within Homestead Air Reserve Base and former federal property deeded now or in the future to Miami-Dade County or the City of Homestead, as provided in section 331.304(6), Florida Statutes (2024); and

WHEREAS, the designation provides Miami-Dade County with a new economic development platform to pursue aerospace, aviation, defense, advanced manufacturing, research and development, space technology, maintenance, repair and overhaul, and other related industries, consistent with applicable federal, state, and local requirements; and

WHEREAS, Space Florida, the State of Florida's aerospace finance and development authority, recognizes Spaceport Territories as hubs for aerospace commerce and innovation and identifies such territories as locations that can support aerospace development and potentially access state space transportation infrastructure programs; and

WHEREAS, the County desires to coordinate closely with Space Florida, the Florida Department of Transportation, other appropriate state and federal agencies, and public and private partners to position the County-owned Properties to compete for aerospace projects and associated public and private investment, and this coordination may include, for example, working to identify infrastructure that may be needed, other steps related to site-readiness, or other possible investments, together with the identification of possible funding sources or development models that could reduce the need for County funding; and

WHEREAS, the HARB is a strategically important military installation and significant economic asset for South Miami-Dade, and, as provided in section 163.3175(1), Florida Statutes, it is "desirable for the local governments in the state to cooperate with military installations to encourage compatible land use, help prevent incompatible encroachment, and facilitate the continued presence of major military installations in this state" so that the potential future development of the County-owned Properties remains compatible with the current and future missions, operations, and security requirements of the installation, while strengthening the aerospace, defense, and national security ecosystem surrounding the installation; and

WHEREAS, the Spaceport Territory designation of the County-owned Properties may create an opportunity to leverage the County's existing aviation and aerospace assets, workforce, educational institutions, international connectivity, and proximity to the HARB to attract aerospace

and related industries that could provide skilled employment, capital investment, and opportunities for local businesses and residents; and

WHEREAS, the Urban Land Institute ("ULI"), working with County and community stakeholders, prepared the Miami-Dade Aerospace Zone report ("ULI Report"), attached hereto for reference as Exhibit B, which includes the ULI's recommendations as to a conceptual framework for the further development of infrastructure, investment readiness, governance, funding, military compatibility, and promotion of the County-owned Properties; and

WHEREAS, the ULI Report includes recommendations and background information that may serve as a reference and guidance as the County proceeds with steps towards potentially developing this area; and

WHEREAS, the Jorge M. Pérez Metropolitan Center at Florida International University prepared a 2026 Competitive Assessment of South Miami-Dade County for the Economic Development Council of South Dade, attached hereto for reference as Exhibit C (the "2026 Competitive Assessment"), that identifies (1) aerospace, aviation, and defense-related industries and (2) the Miami-Dade Spaceport Territory, as key economic opportunities in Miami-Dade County; and

WHEREAS, this 2026 Competitive Assessment may serve as a reference and a source of recommendations which could be considered by the County and potential public and private entities that may be interested in collaborating with the County or otherwise working on development in this area; and

WHEREAS, the City of Homestead, the City of Florida City, the Village of Palmetto Bay, the Town of Cutler Bay, and the Village of Pinecrest have approved resolutions supporting and endorsing the 2026 Competitive Assessment, and these resolutions are attached for reference as composite Exhibit D; and

WHEREAS, Miami-Dade County Public Schools has demonstrated a longstanding commitment to expanding access to aviation and aerospace education through programs such as George T. Baker Aviation Technical College, SpaceHUB magnets at Hialeah-Miami Lakes Senior High School and Booker T. Washington Senior High School, and a future aerospace and aviation program and accompanying state-of-the-art, innovative facilities, to be located at 900 NE 23rd Avenue in Homestead, Florida, the latter of which represents an important step in developing the educational pathways and regional pipeline of skilled talent needed to prepare South Miami-Dade students for careers in aviation, aerospace, engineering, and related technical fields; and

WHEREAS, Miami-Dade College has also provided a letter of support for the development of the County-owned Properties for aerospace, aviation, and defense-related industries, and this support is attached for reference as Exhibit E; and

WHEREAS, the County Administration has engaged representatives of relevant County departments, the HARB and other appropriate federal partners, Space Florida and relevant state agencies, educational and workforce institutions, the Economic Development Council of South Dade and other economic development organizations, and other aerospace, aviation, defense, advanced manufacturing, and related industry stakeholders to discuss the future development of the County-owned Properties; and

WHEREAS, such discussions related to priorities, infrastructure and site-readiness needs, military compatibility, industry engagement, workforce development, funding opportunities, and the evaluation of potential development and investment opportunities in connection with the County-owned Properties; and

WHEREAS, this Board desires to direct the County Mayor or County Mayor's designee to take certain actions to facilitate the future development of the County-owned Properties as an aerospace hub, including the preparation of a request for proposals or other competitive solicitation, among other actions,

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COUNTY COMMISSIONERS OF MIAMI-DADE COUNTY, FLORIDA, that:

Section 1. This Board wishes to direct the County Mayor or County Mayor's designee to take the following steps and pursue the following actions to facilitate the development of the County-owned Properties as an aerospace hub, focusing on the aerospace industry and which may include aerospace, aviation, defense, advanced manufacturing, maintenance, repair and overhaul, space technology, research and development, and other compatible industries:

a. Coordinate with the Florida Department of Transportation as to future grant opportunities, such as how to best position the County-owned Properties for future grant funding, and what may be advantageous in future grant applications; and

b. Investigate and identify other possible funding sources, including possible grant opportunities, as well as available state, federal, and private funding and financing opportunities related to the County-owned Properties, including, but not limited to, infrastructure, site readiness, and development; and

c. Coordinate with the HARB and, as appropriate, with the United States Air Force or other federal agencies, consistent with section 163.3175, Florida Statutes; and

d. Coordinate with Space Florida, the Florida Department of Transportation, federal agencies, and other public and private partners related to the County-owned Properties, and the inclusion of such County-owned Properties within the Florida Spaceport System Plan or other Space Florida plans or planning actions; and

e. Promote the County-owned Properties and conduct targeted outreach to aerospace, aviation, defense, advanced manufacturing, maintenance, repair and overhaul, space technology, research and development, and other compatible industries; and

f. Identify development opportunities and engage prospective employers and investors whose proposed uses are compatible with the current and future missions and operations of the HARB; and

g. Develop strategies to connect future aerospace investment with County residents, educational institutions, apprenticeships and workforce programs, local businesses, and the broader regional aerospace and aviation ecosystem; and

h. Coordinate and consult with the District Commissioner, as appropriate and permissible.

For all of the above, to the extent that no additional funding is needed or that sufficient legally available funds are identified within the Fiscal Year 2026-2027 adopted budget to fund the costs of all or a portion of the actions described herein in Section 1, the Board directs the County Mayor or County Mayor's designee to take such actions as quickly as possible. To the extent that there are insufficient legally available funds within the Fiscal Year 2026-2027 adopted budget to fund all or a portion of the actions described herein in Section 1, the County Mayor or County Mayor’s designee shall, within 120 days of the effective date of this Resolution, advise this Board

through a written report that includes recommendations as to proposed funding sources, and the County Mayor or County Mayor's designee shall, pursuant to rule 5.06(j) of the Board's Rules of Procedure, place the completed report on an agenda of the full Board without committee review.

Section 2. The County Mayor or County Mayor's designee shall solicit contracts to effectuate the purposes of this Resolution, which may include contracts for firms to assist the County to market the County-owned Properties, and may include a solicitation for a lease for a master developer of the County-owned Properties. Any such solicitations shall ensure that the firms or developer demonstrate prior experience with privately financed large scale multi-use development, access to appropriate capital to fund development through final build out, and an ability to deliver projects in South Florida. The County Mayor or County Mayor's designee shall use the procurement mechanism that is most efficient in delivering this project to award such lease or contract. The solicitation should include all of the County-owned Properties as defined above, except that it should not include any County-owned property which is currently the subject of an existing lease or other property conveyance agreement or property which is being separately reviewed for conveyance; however, for any such property, if the above-referenced agreement or review has been terminated or rescinded, or as applicable, withdrawn, denied, or otherwise discontinued, before the solicitations have been finalized or otherwise issued, then said property shall be included within the scope of the above referenced solicitations. Before any such solicitations are finalized or otherwise issued, the County Mayor or County Mayor's designee shall present for approval such draft solicitations to this Board, together with any request to allocate County funding which may be needed to carry out such competitive solicitation as well as recommendations from the County Mayor or County Mayor's designee as to proposed funding sources. The County Mayor or County Mayor's designee shall prepare a written report for this

Board within 120 days of the effective date of this Resolution with all of the above information, and the County Mayor or County Mayor's designee shall, pursuant to rule 5.06(j) of the Board's Rules of Procedure, place the completed report on an agenda of the full Board without committee review.

Section 3. Rule 5.06(a) of the Board's Rules of Procedure is suspended by a two-thirds vote of the Board members present as related to the preparation and enactment of ordinances and resolutions.

The Prime Sponsor of the foregoing resolution is Vice Chairman Kionne L. McGhee. It was offered by Commissioner , who moved its adoption. The motion was seconded by Commissioner and upon being put to a vote, the vote was as follows:

Anthony Rodriguez, Chairman
Kionne L. McGhee, Vice Chairman

Marleine Bastien	Juan Carlos Bermudez
Sen. René García	Oliver G. Gilbert, III
Roberto J. Gonzalez	Keon Hardemon
Danielle Cohen Higgins	Vicki L. Lopez
Natalie Milian Orbis	Raquel A. Regalado
Micky Steinberg	

The Chairperson thereupon declared this resolution duly passed and adopted this 17th day of November, 2026. This resolution shall become effective upon the earlier of (1) 10 days after the date of its adoption unless vetoed by the County Mayor, and if vetoed, shall become effective only upon an override by this Board, or (2) approval by the County Mayor of this resolution and the filing of this approval with the Clerk of the Board.

MIAMI-DADE COUNTY, FLORIDA
BY ITS BOARD OF
COUNTY COMMISSIONERS

JUAN FERNANDEZ-BARQUIN, CLERK

By:_____
Deputy Clerk

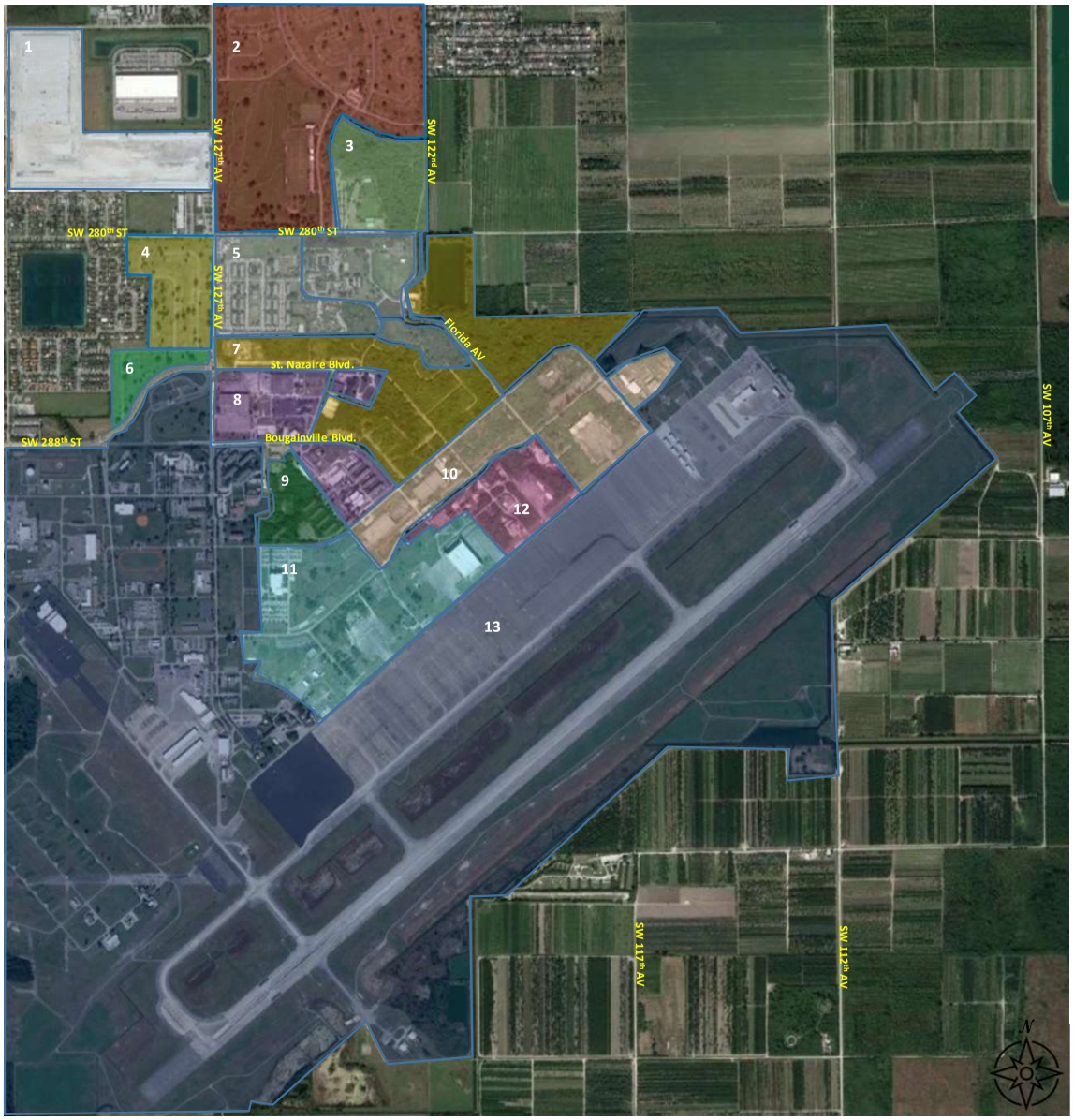
Approved by County Attorney as
to form and legal sufficiency. RCZ

David M. Murray
Ryan C. Zagare
Abbie Schwaderer-Raurell

Exhibit A

HOMESTEAD AIR RESERVE BASE
Parcel Ownership

1. **Amazon**
   30-6935-000-0400; 77 Acres
2. **Miami-Dade County (Homestead Air Reserve Park)**
   30-6936-000-0080; 213 Acres
3. **M-DCPS (Mandarin Lakes K-8 Academy)**
   30-6936-000-0280; 35 Acres
4. **Miami-Dade County (Homestead Town Center)**
   30-7902-000-0040; 30 Acres
5. **Miami-Dade County (Homeless Trust)**
   30-7901-001-0040, 30-7901-001-0010, 30-7902-001-0050, 30-7901-001-0020, 30-7901-001-0030, 30-7901-001-0060, 30-7901-001-0080; 37 Acres
6. **Miami-Dade County (Bus Depot)**
   30-7902-000-0021; 17 Acres
7. **Miami-Dade County (Miami-Dade Steel)**
   123 Acres
8. **Department of Labor**
   30-7901-000-0270, 30-7901-000-0280, 30-7901-000-0170; 40 Acres
9. **Miami-Dade County**
   30-7901-000-0120; 21 Acres
10. **Miami-Dade County (Florida Army National Guard) (Lease)**
    70 Acres
11. **Special Operations Command South**
12. **Miami-Dade County (Hole in the Donut)**
    33 Acres
13. **HARB**



Note:
The parcel boundaries and sizes denoted herein are approximations. Certified boundary surveys should be consulted for exact parcel boundaries and sizes.

MDC013

Miami-Dade County Aerospace Zone

Transforming Spaceport-Designated Lands for Inclusive, Resilient Growth in South Dade

ULI Southeast Florida/ Caribbean



Prepared for:

MIAMI-DADE COUNTY

MDC014

MDC015

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MDC016

4. Introduction

The Miami-Dade County Aerospace Zone ULI Project represents a pivotal initiative to transform County-owned, spaceport-designated lands near the Homestead Air Reserve Base (HARB) into a model for mission-compatible, inclusive, and resilient economic growth. The project's primary objective is to establish a cohesive and replicable development framework that aligns with federal, state, and local goals, harnessing strategic land stewardship to foster regional resilience, equitable opportunity, and Florida's leadership in aerospace innovation.

ULI Leadership Team		
		
Andres Defelice Green Mills Group	Andres Rivero Bilzin Sumberg	Tyler Laforme City of Fort Lauderdale
		
Tyler Weiss Willis Towers Watson	Stephanie Guerra Kimley-Horn	Christina Battiston Design Synergy Studio

5. Site History

In 2004, the U.S. Air Force conveyed approximately 601 acres of the former Homestead Air Force Base to Miami-Dade County for economic development and job creation. Portions have since been developed, sold, or constrained, leaving approximately 200 acres within the original area evaluated for spaceport-related redevelopment. This report focuses on approximately 144 acres comprising Parcels 7 and 9, which represent the most viable near-term development opportunity. The remaining Department of Labor property is acknowledged as part of the broader territory but is not the primary focus due to restrictions that may limit allowable development.

In July 2024, these lands were officially designated as a Florida Spaceport Territory, unlocking new economic incentives through Space Florida and the Florida Department of Transportation (FDOT). Despite this milestone, the absence of a unified implementation strategy has resulted in fragmented development and misalignment with long-term regional economic goals.

HARB is a key national defense asset, employing over 3,000 personnel and contributing $350–$400 million annually to the local economy. It also anchors the region's aerospace and defense potential. Previous studies, including the 2002 ULI Advisory Services Panel, provided foundational guidance on reuse and compatibility; this effort builds on that foundation by advancing from conceptual planning to implementation and investment readiness.

The County's goals are to promote inclusive, sustainable economic growth; create pathways to high-quality workforce development; rehabilitate underutilized and environmentally sensitive lands; and foster public-private partnerships that strengthen long-term resilience.

MDC017

6. Site Visit and Stakeholder Outreach

6.1. Tour of the Spaceport Designated Land

The ULI Team toured the site with representatives from Miami-Dade County on Tuesday, February 17, 2026.

This site visit allowed the team to visualize the existing condition of the property and the proximity to HARB as well as better understand the challenges and risks relating to environmental mitigation, drainage, and energy availability. Table 1 includes photos of the existing roadway conditions and utilities in the vicinity of the site.

6.2. Stakeholder Engagement

Stakeholder meetings were held to garner feedback on the unique challenges and key features of the site. These meetings included representatives from the aerospace industry, community partners, HARB representatives, Space Florida, Miami Dade College, FIU, OEMs, and MRO providers. Stakeholder meetings took place on the following dates:

- March 5, 2026 – Meeting with Larry Ventura from HARB
- March 10, 2026 – Meeting with Community Partners
- March 12, 2026 - Meeting with Industry Representatives
- March 19, 2026 – Follow-up Meeting with Space Florida
- April 10, 2026 – Follow-up Meeting with Representatives of the South Dade Aerospace Zone
- May 15, 2026 – Meeting with Regional Planning Council and Rick Miller, Captain, U.S. Navy (Ret) Executive Director, South Florida Defense Alliance Founder & CEO, PHAROS Mission Critical Solutions

The following sections summarize the topics discussed and key takeaways from those meetings.

MDC018

Table 1: Site Visit Photos

 *St Nazaire Blvd*	 *Florida Ave (SW 122 Avenue) – Utilities*
 *Bougainville Boulevard*	 *St Lo Blvd*
 *Biscayne Drive*	 *Tallahassee Road (SW 137th Avenue)*

MDC019

6.2.1. Mission Compatibility and Base Considerations

Discussions with HARB representatives emphasized that protecting mission sustainment, operational security, and encroachment management is fundamental to any adjacent development. Participants highlighted the importance of land use controls related to building height, massing, lighting, emissions, and visual sightlines, particularly where development could overlook or interfere with base operations. While aerospace-related uses were generally described as compatible with the base's mission, this perspective was framed as informal and subject to established chain-of-command limitations, with the base unable to directly promote or engage in specific development discussions. Resiliency investments, particularly those related to energy, water, wastewater, and transportation access, were noted as mutually beneficial to both the County and the installation. Figure 1 illustrates the subject site location and its proximity to the base.

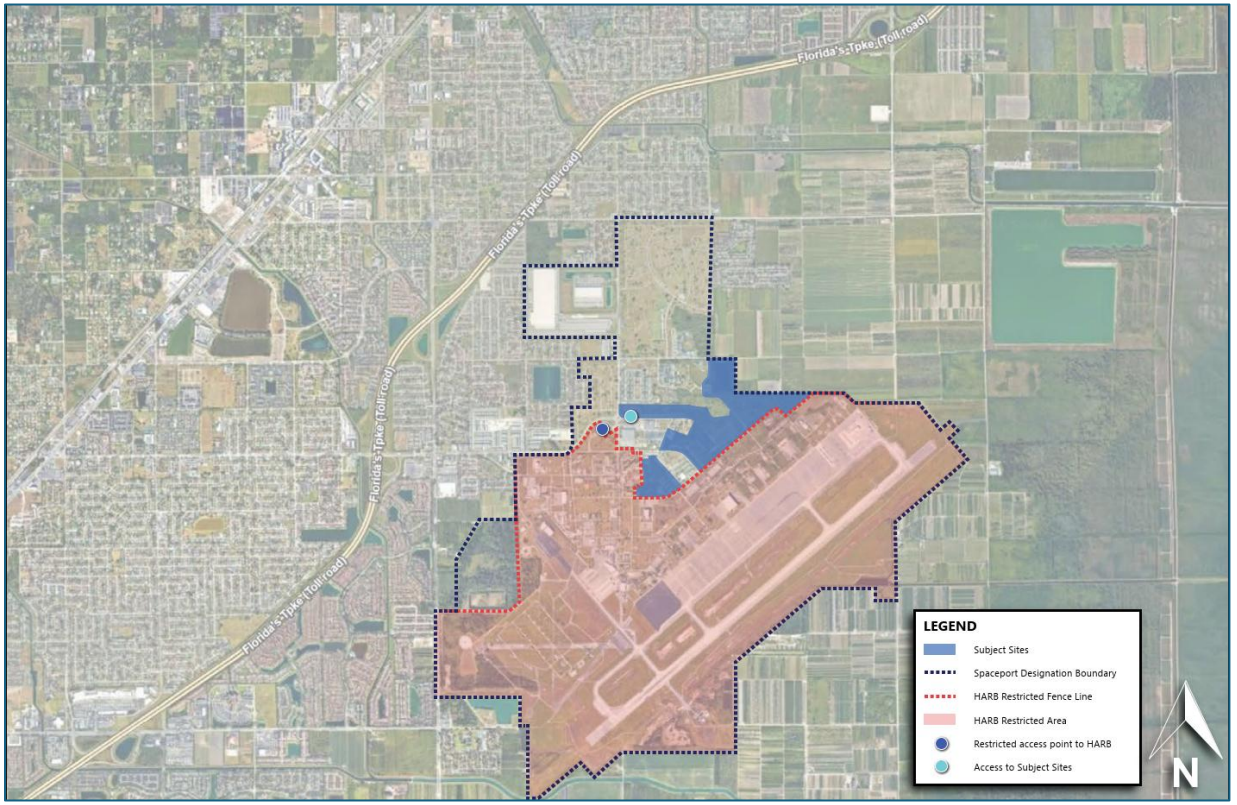


Figure 1: Site Location

6.2.2. Development Parameters and Market Alignment

Stakeholders consistently underscored that development feasibility is shaped by clear physical and operational constraints. It was explicitly stated that the County-owned parcels do not have and will not have access to the HARB runway, significantly influencing viable land uses. As a result, runway-dependent activities such as heavy or line maintenance were described as inappropriate for the site. In contrast, aerospace-adjacent and defense-support uses, including advanced manufacturing, supply chain and logistics, training, cybersecurity, and non-runway-dependent MRO support, were identified as more realistic and market-aligned. Participants emphasized the importance of clearly defining the site's role to avoid unrealistic expectations or comparisons to major launch facilities elsewhere in Florida.

6.2.3. Infrastructure Readiness and Constraints

Across stakeholder groups, infrastructure capacity emerged as a critical determinant of site readiness. Electrical capacity and power reliability were repeatedly identified as primary constraints, alongside roadway access capable of accommodating large and heavy equipment, drainage, elevation, and general utility resilience. Transportation access, including congestion and regional connectivity, was highlighted as a concern for both employers and employees. Energy resilience, storm hardening, and redundancy were discussed not only as development requirements but also as factors tied to regional resilience and base operations.

6.2.4. Workforce and Education Assets

Stakeholders consistently cited workforce development as a major asset for the South Dade area. Existing and emerging education and training programs, spanning K–12 aerospace and STEM initiatives, technical colleges, apprenticeship programs, and postsecondary institutions such as University of Miami (UM), Miami-Dade College and Florida International University (FIU), were described as well aligned with aerospace and aviation-related industries. Proximity to these institutions and the ability to sustain a skilled talent pipeline were identified as decisive factors in site selection decisions for aerospace and advanced manufacturing employers. Additionally, an aerospace magnet high school is planned for construction in South Miami-Dade County.

6.2.5. Role of the Spaceport Designation

The Spaceport designation was consistently characterized as a strategic tool for positioning and funding eligibility rather than a prescriptive land-use mandate. Stakeholders noted that the designation connects the site to a broader statewide network and enables access to state and federal funding sources, including those administered through Space Florida and FDOT, provided that development activities align with qualifying criteria. This reinforced the importance of aligning infrastructure investments and targeted industry uses with funding eligibility requirements.

Across meetings, participants emphasized the need for a clear, unified narrative that articulates the site's intended role within the regional aerospace and defense ecosystem. Stakeholders cautioned that ambiguity about future uses could lead to stakeholder conflict, misaligned expectations, or incompatible development outcomes. A shared long-term vision, grounded in mission compatibility, infrastructure reality, workforce strengths, and realistic market positioning, was identified as essential to guiding future decision-making and engagement efforts.

7. Current Challenges

The primary challenges of developing the site arise from vulnerability to flooding, lack of electrical resiliency and redundancy, limitations to existing roadway access, the need for environmental remediation, funding and governance restrictions, and a lack of existing runway access.

7.1. Stormwater Management and Drainage

A portion of property is within the Coastal High-Hazard Area. Per the South Florida Military Resilience Strategy (2023), storm surge is a major contributor to HARB's HIGH overall risk rating. For a Category 1 hurricane, modeled surge depths are less than 3 feet across most of the HARB area; however, Category 2 through 5 storm surge contributes heavily to HARB's Primary Mission Critical Assets being at high risk, and surge depths can exceed 9 feet in the project area as storm magnitude increases. Additionally, a portion of the property was identified as being in a Special Flood Hazard Area (SFHA). SFHAs are defined as the area that will be inundated by the flood event having a 1-percent chance of being equaled or exceeded in any given year. This event is referred to as the base flood or 100-year flood. Figure 2 illustrates the FEMA flood map overlay for the site.

Additionally, the South Florida Military Installation Resilience Review (MIRR) identified existing challenges with flooding of Biscayne Drive and Tallahassee Road as well as vulnerability to storm surge and sea level rise impacts to the G-95 Canal.



Figure 2: FEMA Flood Map

MDC022

7.2. Electrical Resiliency and Redundancy

One of the key vulnerabilities identified for the project site as well as HARB is electrical resilience. The *South Florida Military Resilience Strategy Report* identified this as a critical concern due to the installation's reliance on external power infrastructure and the vulnerability of aboveground distribution systems to extreme wind events. The report highlights the lack of redundant power sources as a key risk, noting that disruptions to the regional grid could impact operations. To improve electrical resiliency and redundancy, coordination with Florida Power & Light (FPL) is recommended to harden substations and transformers, selectively underground electrical distribution where feasible, and implement automated switching technologies to improve system reliability and recovery. These measures are intended to enhance both resilience to storm-related impacts and overall redundancy of electrical service for both HARB and the project site.

7.3. Vehicular Access and Circulation

Primary vehicular access between the site and Florida's Turnpike is provided via interchanges on Biscayne Drive and Tallahassee Road, both of which are prone to flooding. Additionally, existing access via these roadways requires that vehicles utilize the existing roundabout at Biscayne Drive/St. Nazaire Boulevard & SW 127th Avenue. This presents challenges for future development as many aerospace-serving industrial uses are required to transport oversized loads. Figure 3 illustrates the vehicular infrastructure in the vicinity of the site. Figure 4 illustrates the property boundary for the subject site.

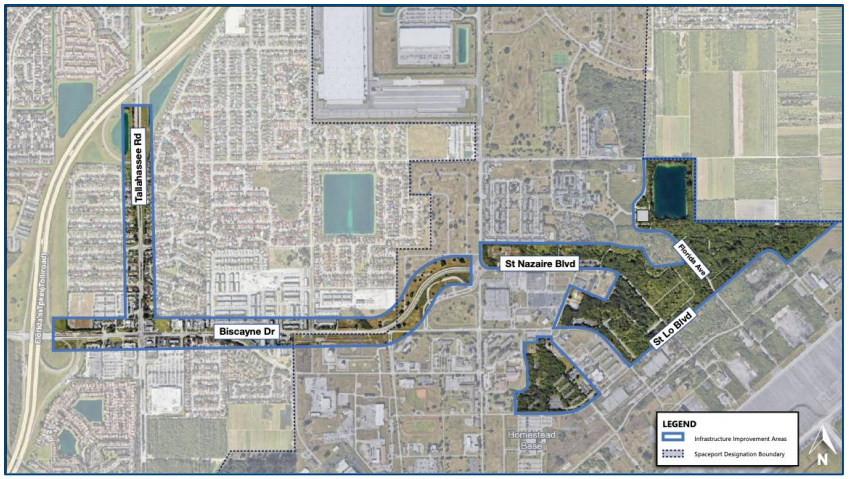


Figure 3: Vehicular Infrastructure

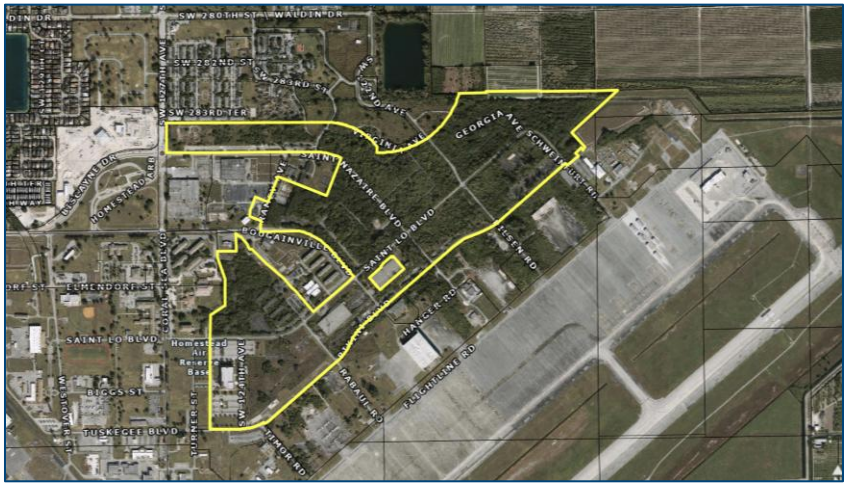


Figure 4: Property Boundary per Miami-Dade County

MDC023

7.4. Environmental Considerations

This section examines the environmental and regulatory constraints affecting the County-owned spaceport-designated lands, with focused analysis on Parcels 7 and 9 as identified on the Miami-Dade County-provided map. While the original subject site included approximately 200 acres of remaining County-owned land within the broader approximately 600-acre spaceport territory, this report focuses on the approximately 144 acres comprising Parcels 7 and 9 because they form the most strategically significant and developable portion of the remaining acreage. The remaining Department of Labor property is subject to restrictions that may limit the types of future development and is therefore treated as a longer-term or secondary consideration.

7.4.1. Site Context and Strategic Framing

Parcel 7 is an approximately 123-acre site that represents the largest single undeveloped County-owned parcel within the spaceport territory. It carries the most complex stack of overlapping constraints on the site: deed-restricted groundwater, Florida bonneted bat critical habitat, a 70 to 75 dB noise exposure zone, and FAA transitional surface restrictions along its southern boundary. Parcel 9 is an approximately 21-acre site that sits immediately adjacent to Parcel 7 and shares essentially the same constraint profile, though with lower noise exposure and no FAA height restriction. Given its size and adjacency, it is best treated as a unified development unit with Parcel 7 rather than developed independently. Considered together, the two parcels form an approximately 144-acre development focus area and represent the most valuable near-term development opportunity in the spaceport territory.

Before turning to each constraint individually, it is worth establishing the right interpretive frame for what follows. The constraints affecting these parcels, while extensive, are all process-driven rather than physically prohibitive. Nothing about these parcels prevents aerospace development. The subsurface environmental conditions exist within an active federal cleanup framework that has been in place at Homestead Air Force Base for more than three decades, and the institutional controls already on the parcels are typical of industrial brownfield redevelopment. The geotechnical conditions are well-understood as South Florida limestone-and-fill conditions on site are familiar to every contractor active in the region. The bonneted bat critical habitat and other listed species can be mitigated through habitat conservation measures, scheduling, and design standards that are routine in South Florida industrial development. The cultural resources nexus requires Section 106 consultation, but the existing on-site structures have largely been evaluated and recorded as ineligible for the National Register. The noise zone, while restrictive for sensitive uses, is an asset for the right industrial tenants. Every constraint has a defined regulatory pathway with a known agency, a known timeline, and a known cost.

A related point deserves emphasis. The Brownfield framework available under Florida law has been underutilized in framing this project to date. Florida's Brownfields Redevelopment Act (Sections 376.77 through 376.85, Florida Statutes) was designed for precisely this kind of former military-industrial site. The combination of

statutory liability protection, voluntary cleanup tax credits, and a streamlined permitting pathway can make Parcels 7 and 9 more financially attractive to a sophisticated aerospace operator than the constraints alone would suggest, because the operator becomes eligible for state incentives that do not attach to uncontaminated land. Reframing these parcels from constrained to incentivized is both more accurate and more useful for County partners and prospective tenants alike.

7.4.2. Historical Site Context and Known Environmental Setting

Parcels 7 and 9 sit within the historical footprint of Homestead Air Force Base, which operated as a strategic military installation from the 1940s through the early 1990s before transitioning to its current role as Homestead Air Reserve Base. The base's operational history, including fuel storage and delivery, aircraft and vehicle maintenance, firefighter training, and other industrial activities common to military installations of that era, produced a complex legacy of subsurface impacts that have been the subject of federal cleanup activity for more than three decades.

Homestead Air Force Base was placed on the U.S. Environmental Protection Agency's National Priorities List under CERCLA in November 1989, designating it as a federal Superfund site. The U.S. Air Force is the lead agency for cleanup under the Defense Environmental Restoration Program, with USEPA Region 4 and the Florida Department of Environmental Protection providing regulatory oversight under a Federal Facility Agreement. Multiple Operable Units have been delineated across the broader installation footprint, and Records of Decision have been issued addressing various contaminated areas. Known contaminants of concern across HARB's cleanup history include chlorinated solvents (trichloroethylene, perchloroethylene), petroleum hydrocarbons, and more recently per- and polyfluoroalkyl substances (PFAS and PFOS) associated with aqueous film-forming foam used in historical firefighter training. Land use controls and institutional controls are recorded on portions of the installation, including the parcels addressed here.

The Terracon Stage 1 report corroborates and operationalizes this regulatory picture. Terracon's regulatory database review identified 203 on-site listings within the 359-acre study area, including a National Priorities List entry, multiple Federal Facility storage tank entries, Engineering Controls, Institutional Controls, the Florida DEP Delisted Contaminated Sites database, the Well Surveillance Program, and PFAS Federal Sites. An additional 23 listings appear within 100 feet of the study boundary, 86 between 100 feet and one-eighth mile, and 80 between one-eighth mile and one-quarter mile, collectively reflecting the dense regulatory history of the HARB area. Terracon characterizes the on-site likelihood of environmental concern as very high based on these listings. The full Terracon Stage 1 Environmental Site Assessment is included as a reference in the Appendix.

MDC025

Two practical points follow. First, planning remediation for Parcels 7 and 9 must coordinate with the ongoing federal cleanup framework rather than running parallel to it. The institutional controls already recorded on the parcels reflect cleanup decisions formally adopted by USEPA, the Air Force, and FDEP, and any redevelopment activity must operate within those controls. Second, the County's pre-development scope on these parcels should begin with confirming the current status of cleanup actions and recorded controls through direct contact with USEPA Region 4 (referencing the Homestead Air Force Base Superfund site by its current EPA Site ID, to be confirmed from the EPA Superfund database), the Air Force Civil Engineer Center, and FDEP. The Stage 1 desktop review is an excellent starting point, but the current activity status of each Operable Unit and the precise terms of recorded institutional controls require verification from the agency files themselves.

7.4.3. Subsurface Environmental Conditions and Site Assessment Pathway

Both parcels carry deed restrictions limiting use to commercial or industrial activities and prohibiting on-site groundwater use for drinking or irrigation. The restrictions stem from the historical contamination associated with former Homestead Air Force Base operations. They are recorded against the property and run with the land in perpetuity, modifiable only with formal USEPA concurrence and only upon a demonstration of remediation to residential standards, neither of which is necessary or contemplated for the intended industrial use. The deed restriction is therefore not a development barrier; it is a covenant that must be disclosed to and accepted by any operator.

What the restriction prohibits is residential development of any kind, including schools, daycare, and medical facilities, along with any on-site groundwater wells for drinking, irrigation, or industrial process use. What it permits is the full range of aerospace manufacturing, assembly, testing, logistics, warehousing, office, research and development, and industrial uses, all served by municipal potable water from the County system. This is the standard water supply arrangement for every modern aerospace facility. On Parcel 7, engineering controls are also required, meaning that any ground disturbance, including grading, foundation work, and utility trenching, must be performed under an approved Soil Management Plan that prevents contaminant migration and protects worker safety. This is standard construction practice for brownfield redevelopment. Existing fill is anticipated across previously developed portions of the parcels and must be carefully evaluated and likely improved before supporting foundations, slabs, or pavements.

No environmental site assessments have been completed on Parcels 7 and 9 to date. The Terracon Stage 1 is a desktop screening that identifies the very high likelihood of environmental concerns but is explicitly preliminary in nature and not a substitute for an ASTM-compliant assessment. The pre-development pathway therefore begins with assessment work the County has not yet commissioned.

The pathway proceeds in five steps. The first step is to commission an ASTM E1527-21 Phase I Environmental

MDC026

Site Assessment (ESA) for both parcels. The Phase I ESA documents existing conditions, identifies Recognized Environmental Conditions (RECs), and establishes the baseline for any further investigation. Given the on-site database listings, particularly the NPL, PFAS, and Engineering and Institutional Controls entries identified by Terracon, the Phase I is virtually certain to identify RECs warranting further investigation. The second step is therefore to commission a Phase II Environmental Site Assessment involving soil borings and groundwater sampling at appropriate locations across the combined 144-acre footprint, with analytical suites tailored to the COCs identified in the Phase I (chlorinated solvents, petroleum hydrocarbons, PFAS, metals, and any others indicated). The third step is a Hazardous Building Materials Survey covering all on-site structures planned for demolition, identifying asbestos-containing materials, lead-based paint, and other regulated materials that require management before demolition. The fourth step is to coordinate with USEPA Region 4 and FDEP on the existing institutional controls and to negotiate any necessary updates or modifications through an Institutional Control Memorandum of Agreement (MOA). The MOA documents the specific construction protocols such as vapor barriers, soil stockpile management, groundwater monitoring well protection, and worker health and safety provisions that will govern all ground disturbance activities. The MOA should be referenced as an exhibit in the eventual Development Agreement and in every construction contract on these parcels. The fifth step is to execute a Brownfield Site Rehabilitation Agreement with FDEP under Florida statute. This agreement establishes eligibility for the state's Brownfield incentives, including voluntary cleanup tax credits that reimburse a percentage of eligible site rehabilitation and solid waste removal costs, a job-creation bonus refund for new permanent jobs, statutory liability protection, and a streamlined permitting pathway. The voluntary cleanup tax credits are subject to statutory annual per-applicant and per-site caps and are funded from a limited annual appropriation, so the County and operator should confirm current credit caps and program funding with FDEP before relying on a specific recovery figure. Taken together, these incentives can offset a meaningful portion of the County's and operator's pre-development and remediation costs.

7.4.4. Geotechnical Conditions

The Terracon Stage 1 report adds a layer of analysis that should be reflected in pre-development planning: the geotechnical setting of the site is well-characterized but presents conditions that require thoughtful design and contractor selection. None of these conditions is unusual for South Florida industrial development; all are well within standard construction practice for the region.

Weakly cemented limestone formation underlies the site at depths as shallow as one foot below existing grade, with the bedrock surface generally encountered between one and three feet below grade in Terracon's regional experience. The weathering profile of the limestone is uneven and irregular, even over short horizontal distances. Excavations for foundations and utilities will encounter very dense soil and limestone conditions, and contractors should anticipate hard-dig conditions in some areas. Excavation into the limestone may require specialized tools, equipment, or methods, though blasting is not anticipated. Shallow groundwater is also a defining feature of the site, with NRCS mapping indicating seasonal high groundwater at three feet below grade and Terracon's experience suggesting groundwater between three and five feet depending on local topography. Temporary dewatering will likely be required during construction of foundations, utilities, and any below-grade structures. Site grading should be performed during dry weather to the extent possible, as near-surface granular soils above the limestone become unstable when exposed to the elements or disturbed.

Existing fill is anticipated in areas of previous development on the parcels. Fill must be carefully evaluated and delineated before supporting foundations, floor slabs, or pavements; in most cases it will need to be improved or replaced. On-site soils are anticipated to be corrosive to both concrete and steel, requiring corrosion-protective specifications for buried infrastructure and foundation elements. Foundation systems will depend on structural loads. Terracon indicates that shallow foundations should be suitable for loads up to 150 kips, with deep foundations required above that threshold. Foundations will likely bear directly on engineered fill or limestone formation. The site lies within Sinkhole Area I on the USGS sinkhole classification map, the lowest of Florida's sinkhole risk categories.

Two final geotechnical considerations affect site planning. First, SLOSH modeling indicates potential storm-surge inundation exceeding three feet during a Category 1 event, six feet during a Category 2 event, and nine feet during Category 3 through 5 events. Aerospace facilities with sensitive equipment, manufacturing lines, or finished products will require finished floor elevations, perimeter berming, and stormwater management designed for credible surge scenarios. Second, the pre-development geotechnical scope should include Standard Penetration Test borings to 25 feet, test pits in proposed building pad areas, infiltration and exfiltration testing, corrosion testing, and supporting laboratory work once a site plan is available.

7.4.5. Federally Protected Species and Critical Habitat

The federal Endangered Species Act consultation required for Florida bonneted bat critical habitat is the critical-path constraint for these parcels. Unlike the institutional controls associated with the Superfund legacy, which are stable and well-understood, the ESA consultation is a time-limited process that can be initiated, completed, and resolved. It must be started as soon as practicable, however, because it governs when federal funding can flow to these parcels. No federal transportation funds or grants can be applied to Parcels 7 or 9 until the U.S. Fish and Wildlife Service issues its Biological Opinion. The consultation itself takes a minimum of 12 to 18 months. Every month of delay is a month of funding ineligibility, which is a particularly important consideration given the limited availability and competitive nature of the Spaceport Improvement Program funding.

Figure 5 illustrates the federally designated habitats on the subject site.

The Terracon Stage 1 report broadens the species picture beyond the bonneted bat. The USFWS Information for Planning and Consultation (IPaC) report for the study area identifies potential suitable habitat for several federally listed species in addition to the bonneted bat: the federally endangered Florida panther and Everglade snail kite; the federally threatened eastern black rail, wood stork, eastern indigo snake, and American crocodile; and the tricolored bat as a proposed endangered species whose final listing rule is anticipated. The monarch butterfly is listed as proposed threatened. The Florida bonneted bat has designated critical habitat overlapping the parcels.

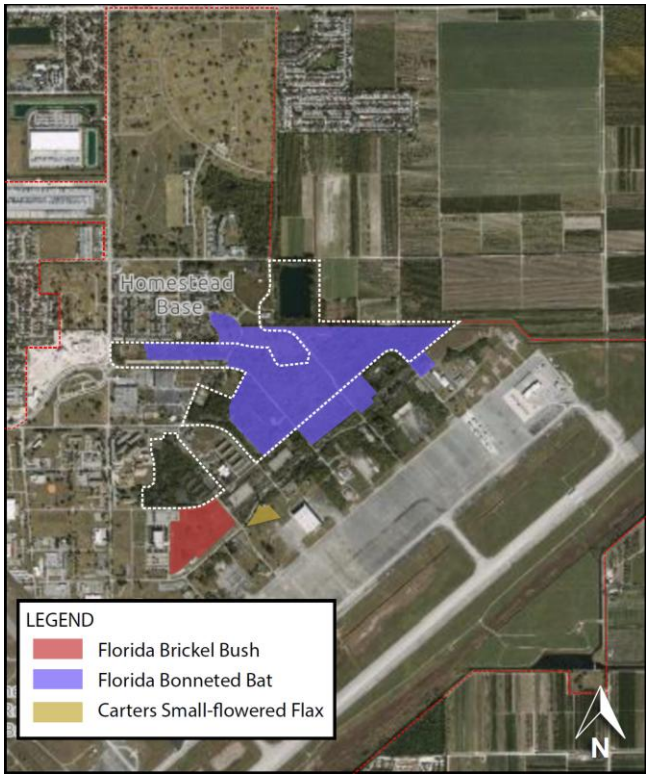


Figure 5: Federal Designated Habitat

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Several of these species require professional habitat evaluation but are unlikely to constrain development. The eastern black rail inhabits tidal marshes and the American crocodile prefers brackish or saltwater settings; given the parcels' inland industrial location, suitable habitat for these two species is unlikely to be confirmed on-site. The Florida panther requires large contiguous forested blocks, and the parcels lie outside the designated Florida Panther Focus Area, so no additional investigation is warranted for that species. The remaining species, the bonneted bat, Everglade snail kite, wood stork, eastern indigo snake, and tricolored bat, require habitat evaluation to confirm presence or absence.

Federally listed plant species also warrant attention. The Florida Brickell-bush (Brickellia mosieri), a federally endangered endemic shrub of pine rockland and coastal berm communities, has critical habitat that partially overlaps the southern portion of Parcel 7. Because the overlap is partial, the development footprint can potentially be designed to avoid the habitat entirely, subject to confirmation by a floristic survey during the October to December flowering season. Additional Pine Rockland endemics, including sand flax (Linum arenicola), are also possible in the area and should be included in the floristic survey scope. The Terracon Stage 1 explicitly notes that its scope did not include state-listed species evaluation, so the habitat assessment commissioned by the County should be scoped to cover both federally and state-listed species per Florida Fish and Wildlife Conservation Commission requirements.

The mitigation pathway is best executed through bundling. A multi-species Threatened and Endangered Species habitat evaluation, conducted by USFWS-permitted biologists, should be completed across both parcels to confirm presence or absence of suitable habitat for each species identified in the IPaC report. The bonneted bat acoustic survey component requires three nights per season, spring, summer, and fall, using Anabat or similar detector systems and will identify any active roost sites within the existing buildings that would require relocation planning before demolition. The botanical survey component is constrained to the October–December flowering window and should be scheduled accordingly. All findings should then be bundled into a single Programmatic Biological Assessment covering the full spaceport territory and submitted to USFWS. USFWS routinely addresses multiple species in a single Biological Opinion, and bundling avoids the 12 to 18 months of additional timeline that sequential consultations would impose. The Biological Opinion will include Reasonable and Prudent Measures specifying mitigation requirements, typically seasonal construction restrictions (avoiding the March through August bonneted bat pupping season for ground clearing near known roosts), installation of bat boxes and artificial roosting structures, preservation of mature tree canopy buffers, and habitat monitoring for three to five years post-construction. If the Biological Opinion determines that the project will result in incidental take of any listed species, a Habitat Conservation Plan and Section 10 Incidental Take Permit may be required in addition to Section 7. Coordination with Miami-Dade DERM, which maintains pre-qualified mitigation sites, would streamline that step if needed.

MDC030

7.4.6. Wetlands, Floodplain, and Aquatic Resources

As shown in the FEMA Flood Map and National Wetland Inventory GIS Map, the broader spaceport territory presents wetlands and floodplain features that require professional evaluation. Within the Terracon Stage 1 study area, National Wetlands Inventory features are mapped on-site, and desktop resources reviewed by Terracon show evidence of aquatic features on-site, including surface waters. A portion of the eastern boundary of the study area falls within a Zone AE Floodplain and a 0.2 percent annual chance flood hazard area. National Hydrography Dataset features are not mapped on-site or adjacent to the site, and hydric soils are not mapped on-site, but the presence of NWI features and aquatic resources requires confirmation through on-the-ground work. Figure 6 illustrates the National Wetlands Inventory overlay on the site.

The pre-development scope for aquatic resources begins with a site reconnaissance by a qualified wetlands professional to confirm Terracon's desktop findings, followed by a formal delineation of aquatic resources with the potential to be regulated as Waters of the United States under Section 404 of the Clean Water Act and/or Section 10 of the Rivers and Harbors Act. The delineation should be coordinated with the U.S. Army Corps of Engineers Jacksonville District for a jurisdictional determination. If jurisdictional features are confirmed and cannot be avoided in the development footprint, Section 404 permitting will be required, with associated mitigation potentially involving on-site preservation, restoration, or mitigation bank credit purchase. Section 404 permitting timelines and costs vary widely based on impact scale.

Site planning should locate buildings and critical infrastructure outside the mapped floodplain and any confirmed jurisdictional wetlands to the extent feasible. Combined with the SLOSH considerations and the stormwater management, this is a meaningful but routine site design constraint that should be communicated to prospective operators and their design teams early in the planning process.

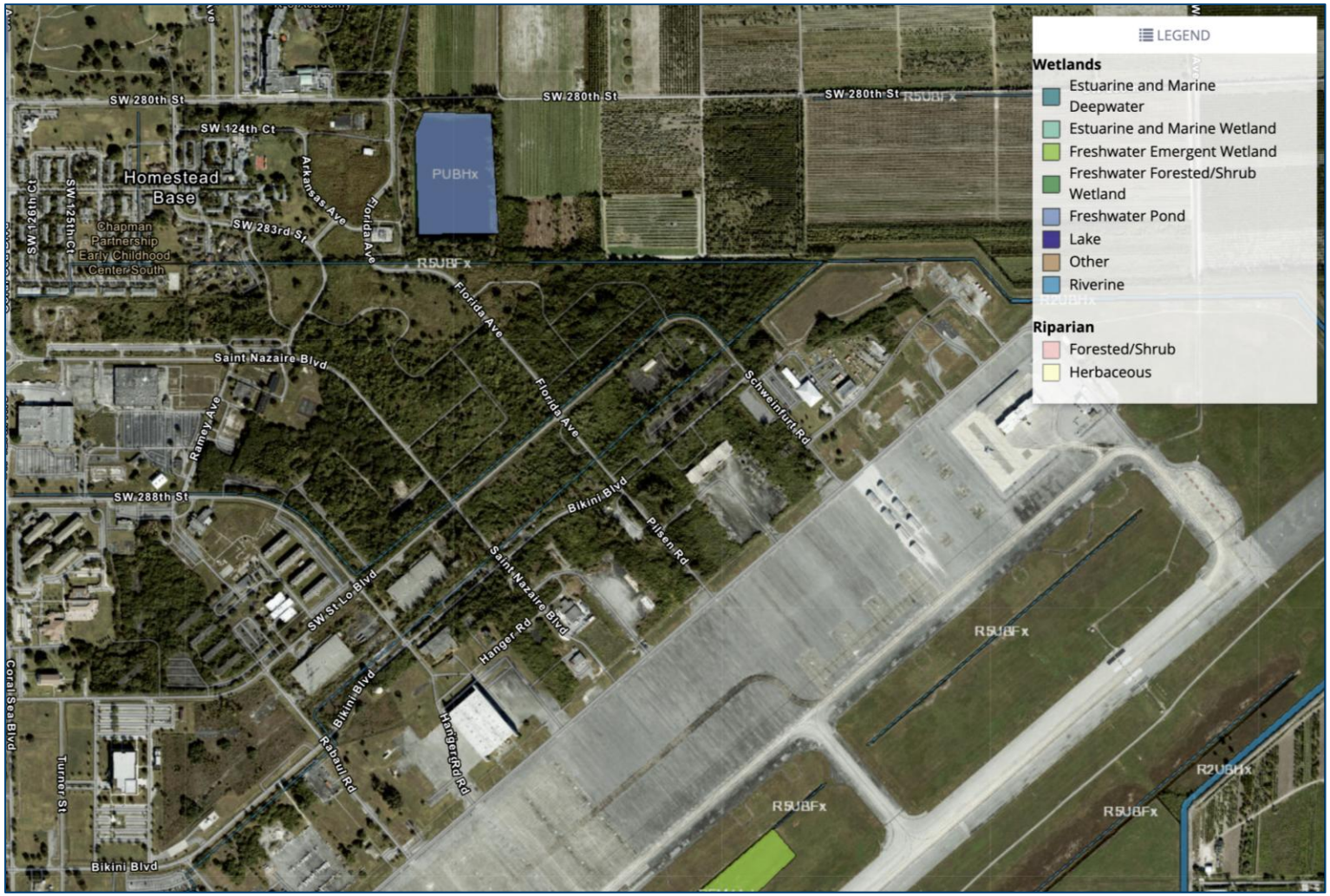


Figure 6: National Wetlands Inventory

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7.4.7. Cultural Resources and Section 106 Compliance

Because federal funding, federal permitting, or federal agency action will be involved in the development of these parcels, Section 106 of the National Historic Preservation Act will be triggered. Section 106 requires federal agencies to take into account the effects of their undertakings on historic properties and to provide the Advisory Council on Historic Preservation and consulting parties with a reasonable opportunity to comment. State and municipal cultural resource preservation requirements also apply.

The Terracon Stage 1 cultural resources review found no resources listed on the National Register of Historic Places within or near the project boundaries, and no mapped cemeteries within a quarter-mile radius. The review did identify the Homestead Air Force Base itself as a recorded Resource Group / Mixed District (Florida Master Site File DA20422) whose NRHP eligibility has not yet been formally evaluated. The parcels lie within the recorded boundary of this resource group. Seventeen individual buildings and facilities associated with the base have been recorded on the FMSF; all have been evaluated as ineligible for the National Register. Ten previous cultural resource surveys have been conducted within a half-mile radius of the parcels, providing a substantial baseline of investigation. Terracon's review also notes a high potential for archaeological resources to be identified on the site, reflecting the broader region's known precontact and historic occupation patterns.

The pre-development cultural resources pathway involves three components. First, a cultural resource desktop study by a Secretary of the Interior-qualified archaeologist should be commissioned to consolidate the existing record, identify any data gaps, and prepare the documentation needed for Section 106 consultation. The Terracon Stage 1 has effectively completed an initial pass at this work and the County may be able to build on it directly. Second, formal Section 106 consultation should be initiated with the Florida Division of Historical Resources (the State Historic Preservation Office), the Federal Historic Preservation Representatives affiliated with Homestead Air Reserve Base, and the Miami-Dade County Historic Preservation Office. The consultation will determine whether further survey work, NRHP evaluation of the HARB Resource Group, or any mitigation measures are required. Third, depending on the outcome of consultation, an NRHP eligibility evaluation of the HARB Resource Group may be undertaken — though this would more appropriately be coordinated at the installation level by HARB itself rather than driven by the County's parcel-specific planning.

7.4.8. Noise Compatibility (AICUZ)

Both parcels lie within Homestead Air Reserve Base noise exposure contours, but the impact varies meaningfully by location within the site. The southern portion of Parcel 7 falls within the 75 dB DNL contour — the threshold at which HUD, FAA, and DoD guidelines classify land use as incompatible for occupied structures without sound attenuation. Standard aerospace industrial uses such as manufacturing, assembly, and warehousing do not have sensitive noise receptors and remain technically compatible, but occupied office, training, or R&D spaces require engineered noise attenuation. The northern portion of Parcel

MDC033

7 and essentially all of Parcel 9 fall in the more permissive 70 dB DNL zone, fully compatible with industrial and commercial uses. Occupied structures in the 70 dB zone require minimum STC-30 wall assemblies and STC-35 roof and ceiling construction to achieve FAA and HUD acceptable interior noise levels (a maximum of 45 dB interior for occupied commercial and industrial space). Given Parcel 9's smaller size and lower noise exposure, it is well-suited to serve as the administrative and R&D component of the combined site, with noise-sensitive uses concentrated there and pure industrial and manufacturing uses concentrated in Parcel 7's southern half.

Three mitigation actions are required. First, the County should request a formal AICUZ land use compatibility determination letter from the HARB Installation Commander covering the specific proposed uses for Parcels 7 and 9. The letter confirms DoD's position that the proposed uses are compatible with HARB's mission and projected flight operations, and is a prerequisite to federal infrastructure funding. Timeline is typically 30 to 60 days once requested. Second, avigation easements should be recorded on both parcels in favor of HARB, granting the right of aircraft overflight and releasing the County and future tenants from noise-related claims arising from HARB operations. Avigation easements are non-negotiable for DoD co-investment and standard practice at military-adjacent development sites nationwide. Third, noise attenuation specifications should be incorporated into the Development Agreement as minimum building standards: STC-30 exterior walls, STC-35 roof assemblies, and double-pane glazing with acoustic laminate for all occupied spaces. For manufacturing or industrial uses in the 75 dB zone, no permanently occupied workstations should be sited within 100 feet of the southern parcel boundary without an acoustic study confirming interior levels below 45 dB DNL.

The 75 dB zone on Parcel 7's southern edge, while a constraint for general occupancy, is in fact ideally suited for a category of aerospace uses that requires precisely this acoustic environment: engine test cells, propulsion testing, acoustic testing chambers, and unmanned systems ground run-up areas. These uses are incompatible with most civilian locations and are difficult to site anywhere in South Florida. Homestead's ability to host them legally, with noise compatibility already established, is a genuine site advantage and aligns directly with the MRO and advanced manufacturing target uses identified in Section 6.2.2.

7.4.9. Environmental Regulatory Compliance

Industrial and manufacturing facilities are subject to a layer of regulatory requirements that exists independently of the contamination, habitat, and cultural pathways discussed above. Two of these warrant attention at the pre-development stage rather than being deferred to operator-led work.

Air permits are typically required before construction of industrial facilities can begin, and aerospace manufacturing, testing, and propulsion-related activities can involve emission sources subject to FDEP and Miami-Dade DERM permitting. An air emissions screening should be conducted as part of pre-development planning to evaluate likely emissions from anticipated

MDC034

tenant operations and to determine whether minor source or Title V permitting will be required. This evaluation also informs the timing of permit applications, which can affect overall project schedule. The screening is best initiated once a target tenant profile or use mix has been identified.

Stormwater permitting under the National Pollutant Discharge Elimination System will be required at both the construction phase (for soil disturbance above the regulatory threshold) and the industrial operations phase (for the operating facility). Stormwater pollution prevention plans, treatment design, and ongoing monitoring obligations should be reflected in the Development Agreement and operator lease terms. Wastewater discharge requirements depend on the specific operator and process; for most aerospace manufacturing, sanitary sewer connection through the Miami-Dade water and sewer system is sufficient, but industrial pretreatment requirements may apply to specific process discharges.

7.4.10. Integrated Pre-Development Pathway and Cost Summary

The pre-development pathway for Parcels 7 and 9 is estimated at approximately $800,000 to $1,600,000, executed across a 24- to 30-month timeline with most workstreams running in parallel. The table below outlines each component, the responsible lead agency, the estimated cost, the timeline, and the funding source. Ranges reflect the inherent uncertainty in scope until the on-the-ground work begins; actual costs will narrow as the Phase I ESA, geotechnical investigation, and species habitat evaluation are completed in the first six to nine months and inform the scope of downstream work.

Three observations on the cost picture deserve emphasis. First, this estimate is materially more comprehensive than environmental mitigation alone because it integrates geotechnical investigation, cultural resources compliance, wetlands delineation, and regulatory compliance work into a single pre-development budget. Second, on a per-acre basis the figure ranges from approximately $5,500 to $11,100 per acre across the 144-acre combined footprint, which remains a competitive range for a brownfield redevelopment of this complexity. Third, a meaningful portion of the County's investment will be recovered through Brownfield tax credits available to the eventual operator under Florida statute, which improves the County's net pre-development cost position. Several line items may also be eligible for partial cost-share through FDOT's Spaceport Improvement Program, Space Florida matching funds, DoD economic development programs, or USEDA grants. These funding pathways are developed in detail in Section 8 and should be pursued in parallel with the technical work.

The integrated picture supports the project's central strategic point: the constraints on Parcels 7 and 9 are real but well-defined, the pathway through them is established, and resolving them positions the parcels as the most investment-grade industrial acreage available to the County within the spaceport territory. This is supported by statutory incentives that are not available on uncontaminated greenfield land. The Joint Use Agreement negotiation, while the longest-duration item, carries the highest strategic upside and should be initiated immediately and in parallel with the other workstreams. Table 2 summarizes the pre-development pathway for the subject site.

MDC035

Table 2: Pre-development Pathway

Pre-Development Item	Lead Agency	Estimated Cost	Timeline	Funding Source
Environmental Site Assessment				
ASTM E1527-21 Phase I ESA	Third Party Environmental Engineer	$15–30K	1 month	County
Phase II ESA (anticipated to be required)	Third Party Environmental Engineer	$150–300K	1-3 months	County
Hazardous Building Materials Survey (HBMS)	Third Party Environmental Engineer	$20–40K	1 month	County
USEPA Institutional Controls coordination + MOA	USEPA R4 / FDEP / RER	$50–100K	6–9 months	County / Operator
FL DEP Brownfield Site Rehabilitation Agreement	FDEP	$20–40K	6–12 months	County
Geotechnical Investigation				
SPT borings to 25 ft + lab testing	Licensed Geotech Engineer	$60–120K	1-3 months	County
Test pits in building pad areas	Licensed Geotech Engineer	$25–50K	1-3 months	County
Corrosion + infiltration/exfiltration testing	Licensed Geotech Engineer	$15–35K	1-3 months	County
Federally Protected Species				
Multi-species T&E habitat evaluation	USFWS-Permitted Biologists	$60–100K	6–9 months	County
Bonneted bat acoustic surveys (3 seasons)	USFWS	$30–60K	6–9 months	County
Brickell-bush + sand flax botanical survey	USFWS / DERM	$20–35K	Flowering season	County
Programmatic Biological Assessment	USFWS	$60–120K	3–6 months prep	County
USFWS Biological Opinion (Section 7)	USFWS	$30–60K	12–18 months	County
HCP + Section 10 ITP (if required)	USFWS	$50–100K	+6–12 months	County
On-site bat mitigation (boxes, buffers, lighting)	USFWS / Operator	$30–80K	At construction	Operator / Developer

MDC036

Table 2 Continued

Pre-Development Item	Lead Agency	Estimated Cost	Timeline	Funding Source
Wetlands, Floodplain, and Aquatic Resources				
Wetlands delineation + jurisdictional determination	USACE Jax / FDEP	$25–50K	3–4 months	County
Section 404 / Section 10 permitting (if jurisdictional)	USACE Jax	$40–80K	3 - 6 months	Operator / Developer
Cultural Resources (Section 106 NHPA)				
Cultural resource desktop study + SHPO consultation	FDHR/SHPO + Miami-Dade HPO	$15–30K	2–3 months	County
HARB Federal HP coordination + Section 106 process	HARB / SHPO	$20–40K	6–12 months	County
HARB Resource Group NRHP evaluation (if required)	SOI-Qualified Archaeologist	$30–60K	3–6 months	County
Noise, Airspace, and Runway Access				
FAA Part 77 airspace analysis + height envelope	FAA OE/AAA	$20–40K	60–90 days	County
AICUZ compatibility letter + avigation easements	HARB / DoD	$5–15K	30–60 days	County
Noise attenuation building specifications	Operator at Design	Embedded	Design phase	Operator
Joint Use Agreement (runway access — high upside)	DoD / HARB	$30–60K (legal)	18–36 months	County / Operator
Environmental Regulatory Compliance				
Air emissions screening + permit evaluation	FDEP / DERM	$15–30K	6–12 months	Operator
NPDES stormwater (construction + industrial)	FDEP / DERM	$10–20K + fees	At construction	Operator
Total Pre-Development Pathway (parcels 7 + 9)		**≈ $800K–$1.6M**	**24–30 months (parallel)**	**County + Operator/Developer**

MDC037

7.5. FAA Part 77 Imaginary Surfaces and Runway Access Opportunity

The FAA transitional surface (a 7:1 horizontal-to-vertical slope extending outward from the runway) clips the southern boundary of Parcel 7. Along that southern edge, the allowable structure height is approximately 50 to 80 feet above grade, varying with distance from the runway centerline. This restricts tall cranes, communication towers, and multi-story structures within roughly 200 to 300 feet of the southern parcel boundary. The northern two-thirds of Parcel 7 and all of Parcel 9 fall under the more permissive inner horizontal surface, permitting structures up to 150 feet above ground level. Single-story aerospace manufacturing — typically 30 to 60 feet — is fully compliant, and multi-story structures up to six to eight floors are feasible with standard FAA Form 7460 notification and a Determination of No Hazard. The HARB airport diagram is provided in the Appendix of this report as Figure 16.

A Part 77 airspace analysis should produce a height envelope GIS layer specifically for the combined Parcel 7 and 9 footprint. Site planning should then locate taller structures such as crane bays, multi-story manufacturing in the northern sections, and lower-profile uses, such as surface parking, outdoor storage, test areas in the southern transitional zone.

Stakeholder outreach (Section 6.2.1) confirmed that the County-owned parcels do not have current access to the HARB runway, and that runway-dependent activities such as heavy or line maintenance are inappropriate for the site under existing conditions. Within that operating frame, a longer-term opportunity remains worth analyzing: the potential to negotiate direct airfield access through a Joint Use Agreement. With DoD approval, a future aerospace tenant on Parcel 7 could potentially gain direct taxiway access to HARB's 10,000-foot runway via a dedicated easement; the operating model used at Cecil Spaceport, where Boeing's facility has direct ramp access to the runway. Direct airfield access is consistently identified as a primary site selection criterion for major aerospace manufacturers, particularly those involved in horizontal launch, large vehicle integration, or air-launched systems. It eliminates the need for heavy-lift road transport of aircraft components, which can otherwise be a binding constraint on facility location.

This item is the most speculative element in the analysis and carries the longest timeline. A Joint Use Agreement is a multi-party DoD-level negotiation that realistically requires 18 to 36 months and is by no means assured given the operational security and mission compatibility considerations described in previous sections. However, if achieved, it would position Parcel 7 as a genuinely distinctive asset in the national aerospace real estate market. The County should consider initiatiating the AICUZ compatibility process and a parallel exploration of Joint Use Agreement feasibility, framed at the federal level as a national-security-aligned economic development priority consistent with Florida's spaceport territory legislative mandate.

MDC038

8. Funding Mechanisms and Governance

The Spaceport Territory designation secured in July 2024 is, first and foremost, a funding designation. It does not by itself change the zoning, entitlements, or ownership of the County's parcels; what it changes is the universe of capital programs for which those parcels are now eligible. This section identifies the funding sources available to the Homestead Aerospace Zone at the local, state, and federal levels, describes how those sources can be sequenced and layered into a complete Phase 1 capital stack, and outlines the application processes through which the County must act to access them. A detailed program-by-program matrix, including eligibility requirements, application cycles, restrictions, and key contacts, is provided in the Appendix (**Error! Reference source not found.**).

Two principles run through this section. First, nearly every available program is competitive and reimbursement-based rather than entitlement-based: funding follows defined, investment-ready projects, not designations or concepts. Second, the programs are designed to be paired. State and federal grants carry non-federal match requirements, and the County's own capital, principally the HARB Trust, generates the greatest value when deployed as match that unlocks several times its face amount in outside funding, rather than as standalone construction dollars. For purposes of this report, the approximately $20 million in EDC Agreement proceeds associated with the HARB parcels is referred to as the HARB Trust.

8.1. Funding Sequencing

The sequencing of public and private investment is a critical factor in advancing development within the Spaceport-designated area. Lessons learned from comparable projects within Florida, including other spaceport-enabled sites, indicate that development is most successful when public infrastructure investment precedes or occurs concurrently with private sector commitment.

8.1.1. Phase 1 – Public Infrastructure Investment

Initial implementation should prioritize public investment in core infrastructure to establish baseline site readiness. Key infrastructure improvements include:

- Roadway access and circulation improvements
- Utility extensions (water, sewer, power, and communications)
- Stormwater management systems
- Environmental mitigation activities necessary to satisfy regulatory requirements

At present, areas adjacent to Homestead Air Reserve Base (HARB), including Parcels 7 and 9, have limited infrastructure capacity, restricted access, and outstanding environmental and regulatory constraints. These conditions present significant

MDC039

barriers to private investment, as developers and end users typically require a minimum level of site readiness prior to committing capital.

Funding programs administered through the Florida Department of Transportation (FDOT), including the Spaceport Improvement Program (SIP) and Strategic Intermodal System (SIS), are specifically structured to address early-stage infrastructure needs at designated spaceport sites. These programs can support the construction of backbone infrastructure and environmentally driven improvements necessary to reduce development risk and improve overall site marketability.

Given the recent designation of the Homestead area as a Spaceport territory (July 2024), early-phase infrastructure funding opportunities may be available; however, the County must submit eligible project applications to access these resources.

8.1.2. Integration of Private Development

Private sector participation should be pursued in parallel with public infrastructure planning and funding. While public investment establishes site readiness, coordination with a potential anchor tenant or development partner during this phase is important for several reasons:

- Demonstrates market demand and feasibility
- Strengthens competitiveness of state and federal funding applications
- Ensures infrastructure is designed to meet the operational requirements of prospective users

Accordingly, the recommended sequencing approach includes:

1. Initiating outreach to potential anchor tenants or aerospace operators to assess interest and obtain preliminary commitments (e.g., letters of interest or intent)
2. Preparing and submitting FDOT/Space Florida funding applications that reflect identified users and anticipated development programs
3. Advancing design and construction of core infrastructure improvements through public funding sources
4. Coordinating with private partners to advance vertical development upon completion or near-completion of infrastructure improvements

This coordinated approach enables alignment between public investment and private development needs, while reducing the likelihood of underutilized infrastructure.

MDC040

8.1.3. Considerations for Development Strategy

Experience from aerospace and related industries indicates that speculative development without identified end users carries elevated risk. Unlike more standardized industrial or logistics facilities, aerospace operations often require specialized infrastructure and building configurations, such as testing facilities, clean rooms, and reinforced structures, which are typically tailored to specific tenants.

As a result, infrastructure investment should be closely coupled with active engagement of potential users to ensure that development proceeds in a targeted and market-supported manner.

Experience at comparable Florida spaceport territories indicates that the relevant question is not whether public or private investment should lead, but in what order each is committed and on what terms. For the Homestead Aerospace Zone, the ULI Team's specific guidance is as follows.

1. **Lead with FDOT-supported infrastructure investment in Phase 1.**

This recommendation rests on three observations.

First, the site has a fundamental readiness gap that private capital alone will not resolve. The acreage adjacent to HARB currently has limited utility infrastructure largely confined to prior military use, no dedicated heavy-vehicle access route, unresolved environmental constraints (including the 2004 conveyance deed restrictions and federally protected species habitat), and no spaceport master plan on file with Space Florida or the FAA. Developers and anchor tenants will not commit capital against that set of open conditions; the pre-development risk is too high to underwrite.

Second, FDOT spaceport infrastructure funding, principally Spaceport Improvement Program (SIP) grants, supplemented where eligible by Strategic Intermodal System (SIS) funds, is structured to resolve precisely this category of pre-development risk. These programs fund the roadway access, drainage, utility extensions, and environmental mitigation that move a site from designated to investment-grade. Cecil Spaceport followed this path before securing its major private aerospace commitments, and Space Coast Regional Airport did the same before commercial operators committed.

Third, because Homestead is among the most recently designated territories (July 2024), there is a reasonable expectation that Space Florida and FDOT will prioritize early-stage SIP allocations to build momentum at the site. That outcome, however, depends entirely on the County submitting an eligible project application; no allocation occurs absent one.

MDC041

2. Time private development appropriately.

The private developer and anchor tenant relationship should be activated in parallel with, or slightly ahead of, the FDOT funding process, not after it. State and federal agencies score applications materially higher when a private commitment letter or letter of intent is already in hand. The recommended order of operations is therefore:

1. Pursue letters of intent from prospective anchor aerospace operators in parallel with FDOT application preparation
2. File the FDOT/Space Florida SIP application with that private commitment attached
3. Apply public funding sources to backbone infrastructure across the development area (approximately $55 million per the Phase 1 estimate)
4. Advance vertical development through the master developer and anchor tenant on the improved sites (approximately $60 million for the first two facilities)

3. Avoid speculative development.

A public-only, “build it and they will come” approach, which consists of constructing generic speculative space without a committed private partner, carries elevated risk in the aerospace sector. Unlike standardized logistics product, aerospace operations frequently require tailored facilities such as test cells, clean rooms, reinforced structures, and specialized clearances, and operators rarely occupy generic speculative space. Public infrastructure investment should therefore proceed in tandem with at least one serious anchor tenant negotiation.

In summary, FDOT-led public investment is the appropriate foundation for Phase 1, with a balanced public-private capital stack as the target state. The Cecil Spaceport experience, discussed below, demonstrates that this model has worked in Florida at a comparable military-adjacent site with a similar mix of funding sources.

MDC042

8.2. Available Funding Sources and Program Capacity

Six primary funding sources, each with spaceport or defense-community precedent, are available to the Miami-Dade Aerospace Zone. They span the local, state, and federal levels and differ in form, including trust fund capital, competitive grants, and tax-advantaged financing, which allows them to be layered rather than substituted for one another. Each is summarized below; program details, contacts, and restrictions are catalogued in the Appendix matrix.

8.2.1. Local Foundational Capital: Miami-Dade County HARB Trust Fund

The County manages the HARB Trust, which is the only source in the stack fully within the County's control, and its highest and best use is not direct construction. Deployed as the non-federal match across the Spaceport Improvement Program, EDA, and OLDCC applications described below, the HARB Trust can unlock several multiples of its face value in outside grant funding. This match-multiplier logic is at the center of the recommended capital stack. The HARB Trust is also the natural source for the pre-development costs that precede any grant award: Phase I and Phase II environmental site assessments, NEPA scoping, master plan procurement, and application preparation. These early expenditures are modest relative to the HARB Trust but are the gating items for every other source in this section.

8.2.2. State Programs: FDOT and Space Florida

The FDOT Spaceport Improvement Program (SIP) is the principal state infrastructure source. Annual statewide capacity has ranged between approximately $70 million and $95 million in recent cycles, awarded competitively across Florida's designated territories through an annual Call for Projects administered with Space Florida. Eligible costs include launch and processing facilities, on-site roadways and utilities, site preparation and land development for aerospace tenants, and aerospace manufacturing and assembly buildings. The program can fund up to 100 percent of eligible costs, but funding is reimbursement-based, and applications demonstrating local match and private co-investment score materially higher. Approved projects are programmed through the FDOT Five-Year Work Program, which introduces a structural lag between award and disbursement that the County's cash-flow planning should anticipate.

Space Florida, as the state's aerospace finance and development authority, offers a financing toolkit available on an ongoing basis rather than through an annual cycle: conduit bond financing for facilities, equipment, and tooling; synthetic lease structures for new construction on government-owned land, for which the County's Homestead parcels qualify; and the ad valorem and sales tax efficiencies that flow from leasing through a governmental owner. Of particular note, federal tax legislation effective January 1, 2026 added spaceport facilities as a qualified category of tax-exempt private activity bonds under IRC §142, allowing manufacturing, assembly, launch, and processing facilities at designated spaceports to be financed at tax-exempt interest rates

MDC043

with Space Florida as conduit issuer. Bond counsel should be engaged early to confirm structuring requirements, including governmental ownership of financed facilities and volume cap treatment, which differ across §142 categories.

The International Aerospace Innovation Fund, created by Senate Bill 1516 effective July 2025 and administered by Space Florida with an initial $10 million allocation, provides competitive grants for research and development, workforce development, and commercialization initiatives involving Florida-based aerospace companies. It is not an infrastructure source, but it strengthens the tenant-attraction case: prospective operators can pair facility commitments at Homestead with state support for their research and workforce programs, which improves the overall economics of locating at the site.

8.2.3. Federal Programs: EDA and OLDCC

The U.S. Economic Development Administration (EDA) funds public works projects, including water, sewer, roadway, and industrial site infrastructure, that support private job creation. Typical public works awards have ranged from roughly $150,000 to $2.5 million, with maximum requests of up to $30 million for projects of regional significance. The federal share is generally 50 percent, with higher shares available in economically distressed areas, a test that portions of South Dade are likely to meet. EDA applications must align with the region's Comprehensive Economic Development Strategy and score strongly where local match, private commitment, and quantified job creation are documented. These are the same elements the SIP process rewards, which is why a single well-prepared Phase 1 project scope can serve multiple applications.

The Department of Defense Office of Local Defense Community Cooperation (OLDCC) administers the Defense Community Infrastructure Program (DCIP), with approximately $230 million available in the FY 2026 cycle and a maximum request of $20 million per project. DCIP funds community-owned infrastructure that enhances the military value, installation resilience, or quality of life of an installation, and it requires both a community match and the support of the installation. Homestead is unusually well positioned in this channel: the South Florida Military Resilience Strategy has already identified utility redundancy projects benefiting HARB, including the recommended wastewater connection south of the installation and the electrical hardening and redundancy measures described in the Environmental Considerations section, that double as enabling infrastructure for the Aerospace Zone. Framing Phase 1 infrastructure as installation resilience is both accurate and strategically valuable, and it reinforces the partnership with HARB leadership whose support these applications require.

MDC044

8.3. Sample Capital Stack for HARB Spaceport Designated Territory

Figure 7 presents an illustrative Phase 1 capital stack totaling approximately $115 million, sized to current program award caps. Uses divide into two components: approximately $55 million of horizontal infrastructure across the development area, including roadway access, drainage and stormwater, water and wastewater extensions, electrical capacity and redundancy, and environmental remediation necessary to make the site shovel-ready; and approximately $60 million for vertical construction of the first two Class-A light-manufacturing facilities, totaling roughly 269,000 square feet, inclusive of an $8 million capitalized ground lease payment to the County. Under this structure, the County retains land ownership, consistent with the landowner-partner posture recommended throughout this report.

Sources pair to the programs described above: $20 million from the HARB Trust (approximately 18 percent), $20 million from the Spaceport Improvement Program (17 percent), $25 million in Space Florida financing (22 percent), $15 million each from EDA and OLDCC grants (13 percent each), and $20 million in private master developer equity (17 percent), resulting in a blend of roughly 61 percent public and 39 percent private capital. The HARB Trust and the master developer equity together function as the non-federal match across the SIP, EDA, and OLDCC applications, which is what allows $40 million of local and private capital to support a $115 million program.

Three caveats apply. The figures reflect current program caps, not committed awards; every grant source is competitive, and a realistic plan should assume that not every application succeeds in its first cycle. Federal funds generally cannot serve as the non-federal match for other federal programs, so the EDA and OLDCC applications must each be matched from the HARB Trust, state sources, or private equity rather than from one another. Finally, the modest projected return on cost for the first facility, approximately 6.4 percent on an unlevered basis, underscores why the subsidy layering matters: without it, the vertical development is not financially feasible at the rents the early aerospace market will support.

MDC045

Phase 1 + Building Infill Zone 1 Capital Stack

SOURCES PAIRED TO AVAILABLE PROGRAMS – INFRASTRUCTURE, SOFT COSTS, 1ST FACILITY

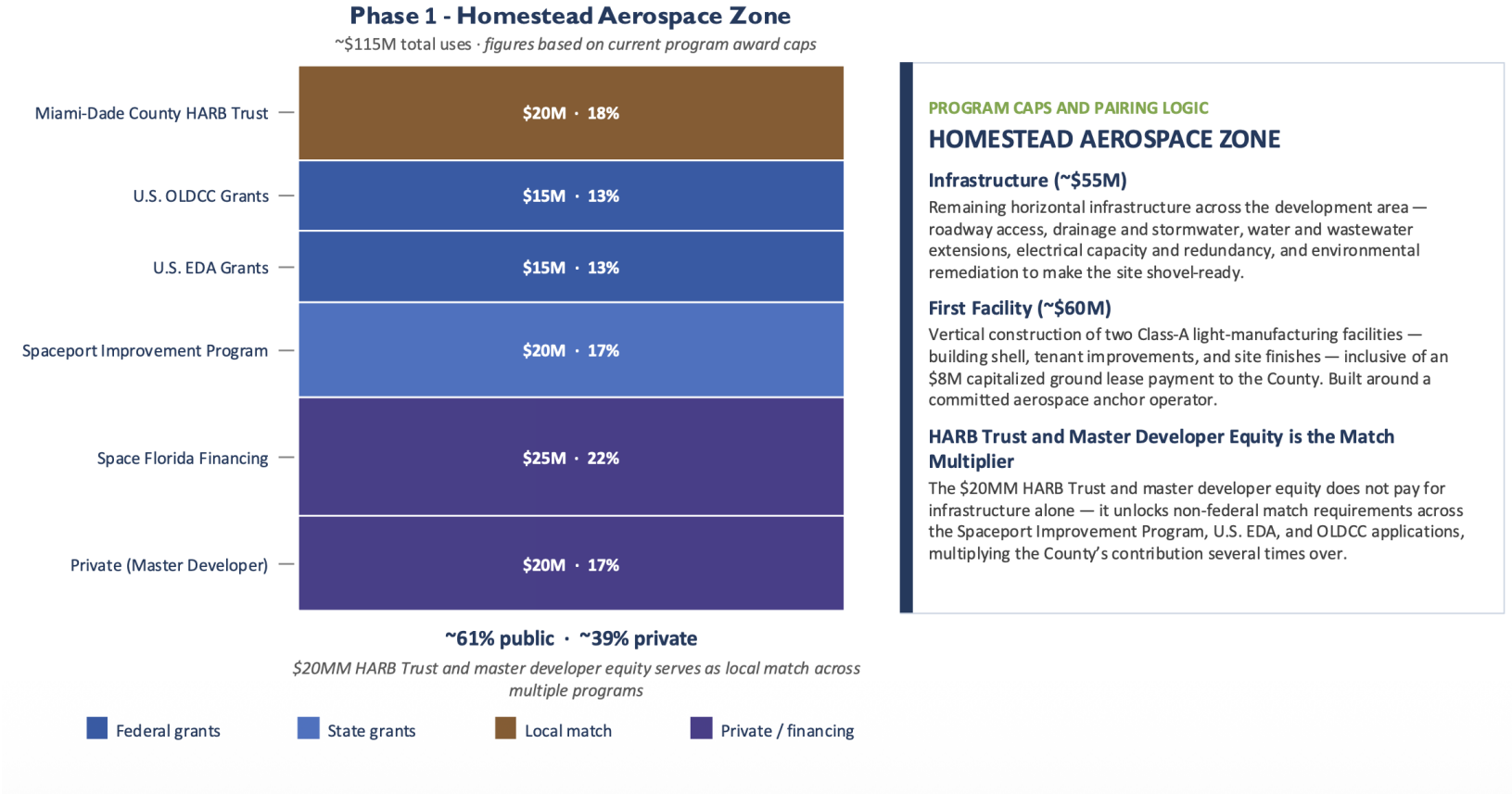


Figure 7: Sample Capital Stack for HARB Spaceport Designated Territory

MDC046

8.4. Cecil Spaceport Capital Stack Comparison

Cecil Spaceport in Jacksonville is the most instructive Florida precedent for Homestead: a former military airfield, conveyed for civilian reuse, that converted a spaceport designation into a functioning aerospace employment district. Cecil received the state's first FAA launch site operator license for horizontal launch in 2010, and its Spaceport Territory designation followed. After designation, the Jacksonville Aviation Authority pursued sustained, incremental public investment, including taxiway and apron improvements, utility extensions, and hangar and processing facilities funded substantially through FDOT spaceport and aviation programs, over more than a decade before the largest private commitments arrived. The reported results include approximately $1.5 billion in committed investment since designation, including announced facilities from Boeing, Hermeus, and Otto Aviation, and roughly 6,225 direct and indirect aviation and aerospace jobs.

Figure 8 compares Cecil's capital stack to the proposed Homestead Phase 1 stack. The composition is similar: recurring state grant cycles layered over local authority capital, with private investment concentrating after the site reached readiness. The timeline is the more important lesson. Cecil's trajectory spans well over a decade of consecutive grant cycles and steady governance under a single public owner-operator, which is consistent with the ten-plus-year build-out horizon and County-led task force structure recommended in this report. The comparison also clarifies what Homestead must do differently. Cecil began with an operating airfield and direct runway access, while the Homestead parcels do not have runway access today, making early infrastructure investment and HARB coordination proportionally more important here.

MDC047

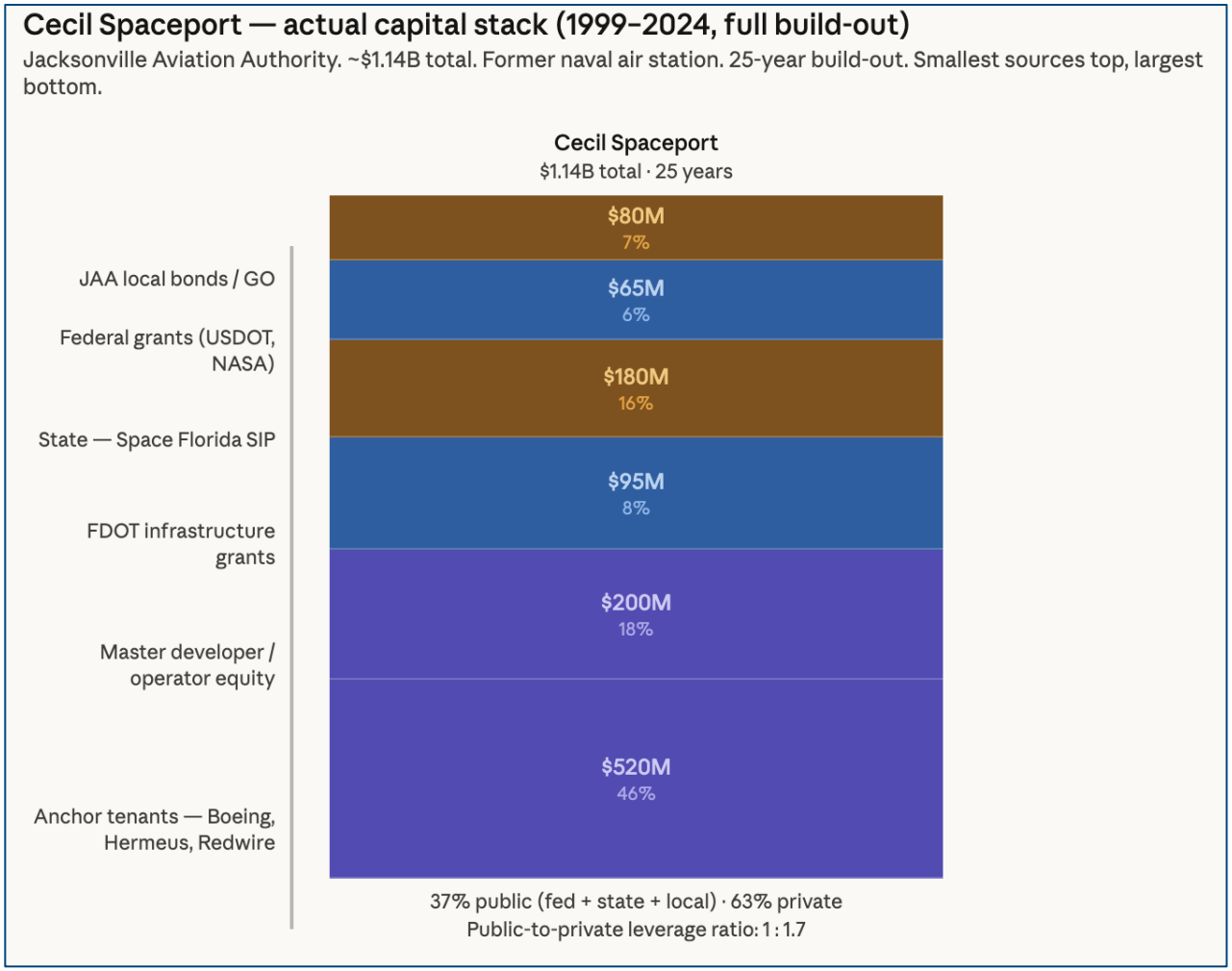


Figure 8: Cecil Spaceport Capital Stack Comparison

MDC048

8.5. FDOT/Space Florida Application Process

The Space Florida Spaceport Improvement Program follows a competitive annual cycle requiring a formal application from an eligible Spaceport Territory applicant or partner.

Step 1: Space Florida issues a "Call for Projects." This is typically issued in the first quarter of each year; the most recent call occurred in February 2026. Private companies and public entities submit proposals identifying the requested infrastructure and explaining how the investment benefits the applicable spaceport territory.

Step 2: The applicant must be a private company or public entity with a specific project. This requirement is central to the application strategy. Space Florida guidance indicates that projects are typically submitted by private companies. The County or a private partner must therefore describe a concrete, near-shovel-ready infrastructure project rather than a concept. Examples include a utility extension, access road, or stormwater system serving a defined parcel, tenant, or development footprint.

Step 3: Space Florida prioritizes the proposals and forwards the strongest projects to FDOT for consideration in the Five-Year Work Program. FDOT then formally allocates funding through the State Transportation Improvement Program.

Step 4: The project must clear environmental review and be investment-ready. FDOT generally will not program a project in the Five-Year Work Program unless land use entitlements, environmental clearances, and design work are substantially underway.

For Homestead, no application appears positioned for submission because no defined project scope has been established. Although the spaceport designation occurred in July 2024, the County lacks the project basis required for submission without a master plan, committed private partner, or specific infrastructure scope.

The most important near-term action is to define the first project scope, ideally with an anchor tenant that can support the application as a private partner. Additionally, a master developer will need to be procured if the initial tenant does not possess the wherewithal to function in that capacity. A public entity, such as the County, paired with a private company with a credible facility commitment, aligns closely with Space Florida's evaluation criteria.

Two structural points frame this process. First, SIP awards must align with a spaceport master plan, and no Homestead master plan has yet been published; procurement is therefore a gating item for sustained funding access. Second, Florida law designates Space Florida as the single point of contact for joint state and federal aerospace funding applications (Section 331.3011, Florida Statutes), making the County’s working relationship with Space Florida the channel through which the federal sources described in this section are coordinated.

MDC049

MDC050

9. Governance and Zoning

The governance and legislative actions outlined below are designed to catalyze the creation of the Aerospace Zone. While each action is incremental, together they represent important early steps to establish the political, regulatory, and administrative framework necessary to support and guide future development within the Spaceport Territory.

9.1. Potential HARB Overlay Zoning Amendments

The County should consider the following amendments to the Homestead Air Reserve Base Overlay in Chapter 33, Article XXXV of the County Code (the "HARB Overlay") to reflect current conditions and support mission-compatible aerospace development:

1. The HARB Overlay should be updated to incorporate the 2020 Air Installation Compatible Use Zone map so that zoning review, development conditions, and compatibility analysis are tied to the most current operational framework for HARB. This will also reflect the updated noise contours reflecting the current operations at the Base.

2. Because the site is currently governed by underlying IU-2 and AU zoning classifications, the Overlay should also be revised to authorize an enumerated list of aerospace-related uses through the Administrative Site Plan Review process regardless of the underlying zoning district. This would create greater certainty for prospective users, reduce unnecessary entitlement friction, and better align the County's zoning regulations with the site's Spaceport Territory designation and economic development objectives. Figure 9 illustrates the existing zoning classifications on the site.

3. The HARB Overlay should be updated to include goals and intent language expressly stating that aerospace-related uses should be prioritized within the overlay area, reinforcing the County's policy commitment to aerospace development as the primary land use objective for the site.

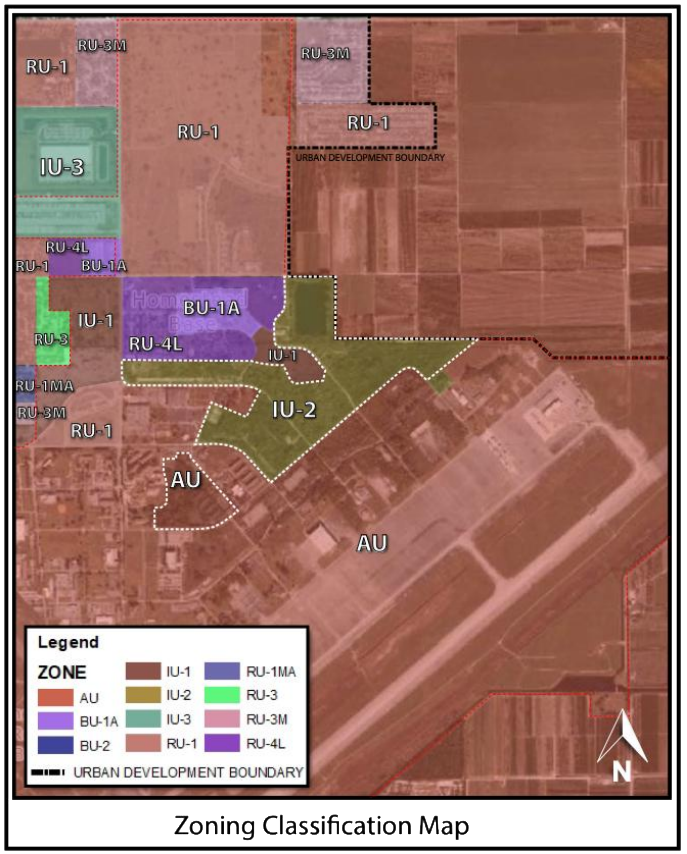


Figure 9: Zoning Classification Map

Even if the proposed amendments to the HARB Overlay are relatively minor in scope, they will serve as an important signal of political support for future aerospace development at the site. Legislative action demonstrates the County's commitment to the Aerospace Zone concept and provides prospective developers and funding partners with confidence that the regulatory environment is aligned with the County's economic development objectives.

Note that all changes to the HARB Overlay and future development approvals will still require notice to and review by HARB, as required under County Code Section 33-295(g) and Florida Statutes Section 163.3175, ensuring that mission compatibility, operational security, height, noise, lighting, and other base-related considerations remain central to project review. HARB, therefore, will continue to be an important partner as the County proceeds with planning for the Aerospace Zone.

9.2. Unlocking EDC Agreement Proceeds

Under the 2004 Economic Development Conveyance Agreement (the "EDC Agreement") between the Air Force and the County, the County has collected proceeds from various conveyances. For purposes of this report, the approximately $20 million in EDC Agreement proceeds associated with the HARB parcels is referred to as the HARB Trust.

The County should take steps to convert the HARB Trust into a deployable implementation tool for the Aerospace Zone. As an initial step, the Board of County Commissioners should adopt legislation that expressly appropriates the HARB Trust for eligible public investments that support economic development on the former Homestead Air Force Base. The BCC item should identify a priority list of eligible uses that tracks the EDC Agreement, including infrastructure, utilities, site improvements, demolition, environmental-related work, planning, marketing, and other capital improvements tied to job creation and redevelopment. The authorization could also delegate implementation authority to a County-led task force, as described below, to expend appropriated funds within approved project categories, subject to County procurement requirements, budget controls, and any required Air Force approval for off-installation investments. This approach would preserve compliance with the EDC Agreement while giving County staff a clear legal and administrative pathway to fund near-term improvements that improve site readiness.

MDC051

9.3. Task Force to Guide and Manage Aerospace Investments

The County should authorize the creation of a task force, led by the Economic Development team in the Mayor's office, to guide and manage aerospace-related investments within the Spaceport Territory. The task force would be responsible for administering County funds, including potentially the HARB Trust discussed in Section 9.2, for environmental remediation, infrastructure improvements, and other eligible capital investments that advance site readiness. In addition, the task force would serve as the County's lead in negotiations with Space Florida, the Florida Department of Transportation, the U.S. Economic Development Administration, and other state and federal funding agencies to secure additional resources for site development. Centralizing investment authority and intergovernmental coordination under a single body will help ensure that public funds are deployed strategically, that funding applications are aligned with the Aerospace Zone's development priorities, and that the County is positioned to move quickly when partnership opportunities arise.

MDC052

10. Key Site Differentiators

10.1. Differentiators from competing locations across Miami-Dade County

The subject site is located within the South Dade submarket, one of ten submarkets identified by CBRE within the greater Miami MSA. The South Dade submarket includes Homestead, Florida City, Cutler Bay, and surrounding unincorporated areas. Based on U.S. Census Bureau ACS estimates, the submarket experienced considerable residential population growth, approximately 14.5 percent from 2019 to 2024, which was nearly three times the growth rate of Miami-Dade County over the same period.

South Dade Population vs. Industrial Supply: Although South Dade represents approximately 14 percent of the County's population and has experienced strong recent residential growth, the submarket accounts for less than 2 percent of total industrial supply across Miami-Dade County. Most industrial supply is located in submarkets with closer access to Miami International Airport (MIA), Opa-Locka Airport, and Port of Miami, stronger highway connectivity, and shorter drive times to neighboring population centers in Broward, Palm Beach, and Collier counties.

Existing South Dade Supply: Existing industrial supply in South Dade is concentrated primarily west of Homestead-Miami Speedway and north of the subject site, including the approximately 1 million-square-foot Amazon facility and the approximately 238,000-square-foot FedEx facility. The remaining inventory is distributed across the Princeton, Goulds, Naranja, and Perrine areas and is generally older-vintage, small-bay space that is less competitive for aerospace, aviation, and defense users requiring modern industrial building specifications.

Existing Aerospace, Aviation, and Defense Tenants: Miami-Dade County has historically attracted aerospace, aviation, and defense tenants and owner-users across privately-owned industrial parks, fixed-base operator facilities, and commercial campuses throughout the County, with concentrations in submarkets closest to MIA, Opa-Locka, and Miami Executive Airport. Select defense contractors also operate dedicated facilities within HARB.

Table 3 and Figure 10 summarize the ten submarkets comprising the Miami MSA, including total available square footage and existing aerospace, aviation, and defense tenants.

Key Takeaway: As of 1Q26, approximately 22.83 million square feet of existing industrial supply was available across the Miami MSA, with approximately 97 percent of that available supply located in the six largest submarkets. Because these submarkets generally provide closer access to MIA, Opa-Locka, Port of Miami, and neighboring population centers, the subject site's competitive position depends on leveraging its Spaceport Territory designation, associated financial incentives, County ownership, and proximity to HARB to attract aerospace, aviation, and defense users that require a differentiated site profile.

MDC053

Table 3: CBRE Miami Industrial Market Summary

CBRE Miami Industrial Market Summary - Q1 2026 (*SF in Millions*)					
Submarket	**Inventory (SF)**	**% of Total**	**Available (SF)**	**% of Total**	**Existing Aerospace/Aviation/Defense Tenants**
Airport/Doral	60.92	25.6%	6.76	29.6%	**Barfield**: FAA/EASA certified repair station serving passenger, cargo, and regional airlines. **Global Turbine Services**: Turbine engine MRO facility. **AerSale:** Heavy maintenance and component overhaul. **Ametek:** MRO facility focused on military and commercial aircraft **Collins Aerospace:** Manufacturer specializing in aircraft interiors (seating, galleys, and lighting) **Lockheed Martin:** Regional corporate, administrative, and engineering hub. Multiple FBOs (Atlantic Aviation, Signature Flight Support, Embassair/JHSF), flight schools, & charters
Central Dade	35.12	14.7%	2.49	10.9%	**Barfield:** Corp HQ and MRO facility for aircraft, helicopters, and drones.
Hialeah	15.60	6.5%	1.79	7.9%	**Landing Gear Technologies:** MRO of commercial, regional, and cargo aircraft landing gear. **AeroRepair Corp:** MRO focused on landing gear, batteries, and hydraulic/pneumatic actuators.
Kendall/Tamiami	13.72	5.8%	0.37	1.6%	**Quality Control Aerospace Services (QCAS):** FAA repair station servicing private/corporate aircraft.
Medley	45.63	19.2%	4.93	21.6%	**HEICO:** Component repair, overhaul, and testing of commercial and military aircraft components. **General MRO Aerospace (GMA):** FAA Part 145 repair station
Miami Lakes	19.76	8.3%	1.96	8.6%	**Boeing:** Aerospace parts and distribution facility
North Central Dade	38.98	16.4%	4.21	18.4%	**Bombardier:** Service center at Opa-Locka. **Collins Aerospace:** Landing gear manufacturing and MRO facility. **NExT MRO:** Certified repair station focused on commercial and military aircraft maintenance. **US Coast Guard:** Maintains fleet of fixed and rotor wing aircraft at Opa-Locka
Northeast Dade	2.51	1.1%	0.15	0.6%	**Barfield:** Aviation maintenance, repair, and overhaul (MRO).
Out of Submarket	1.34	0.6%	0.01	0.1%	
South Dade	4.64	1.9%	0.15	0.7%	**Northrop Grumman:** Aircraft maintenance, system upgrades, logistics & modernization **Lockheed Martin:** On-site operational maintenance, field sustainment, and info system support **AST SpaceMobile:** Advanced manufacturing components for satellites
Total	**238.22**	**100%**	**22.83**	**100%**	

MDC054

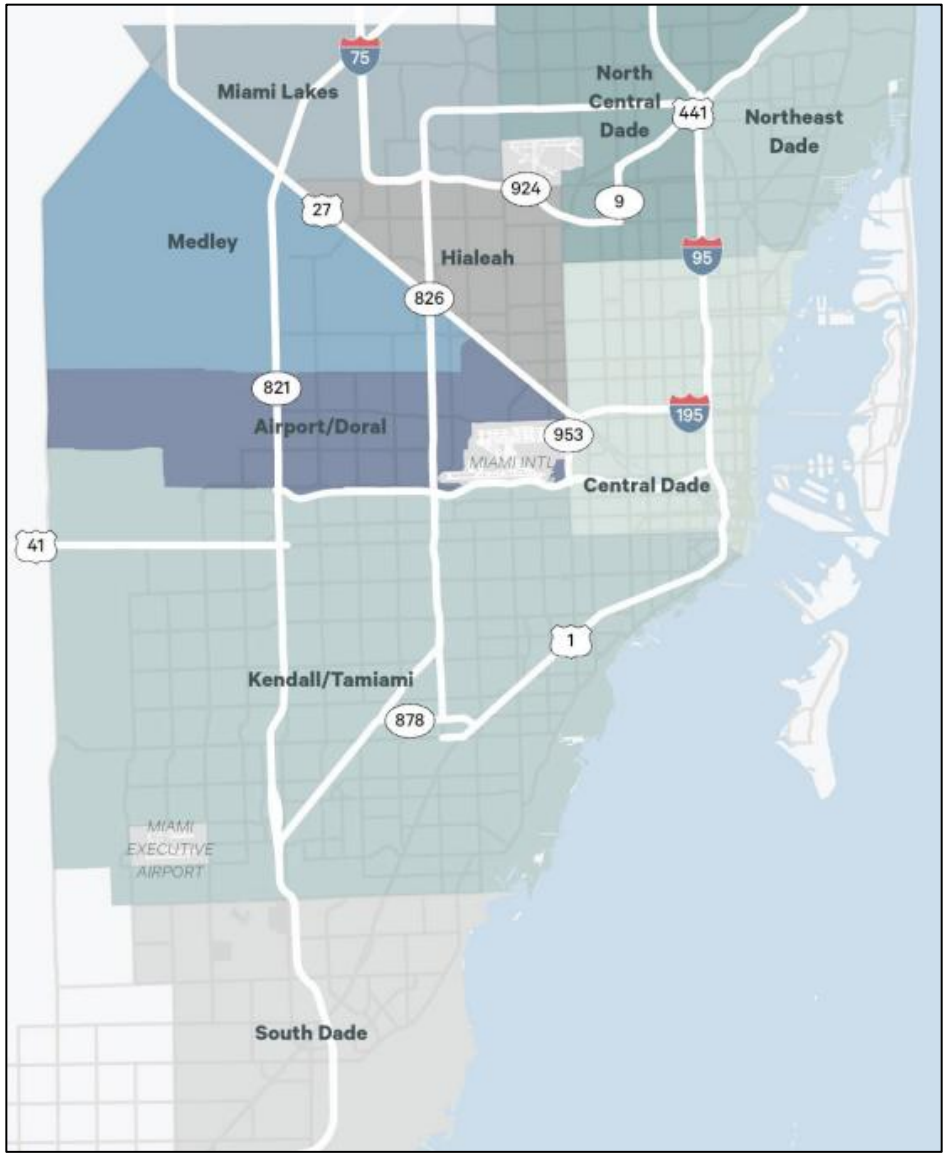


Figure 10: Miami-Dade County Market Regions

MDC055

10.2. Differentiators from Other Spaceport-Designated Sites

Florida has designated seven spaceport territories that support launch activity, aerospace commerce, research, manufacturing, and related economic development. These designated sites include the following:

- **Cape Canaveral Spaceport / Kennedy Space Center / Patrick Space Force Base** (Brevard County)
  - 1989 spaceport designation and encompasses over 150K acres
  - Serves as the anchor to Florida's launch infrastructure with multiple launch pads and processing complexes
- **Cape San Blas** (Gulf County / Panhandle)
  - 1989 spaceport designation and encompasses over 1K acres
  - Utilized for experimental missile testing, suborbital rockets, and upper-atmosphere flight tracking capabilities
- **Eglin Air Force Base** (Panhandle): defense-connected aerospace territory
  - 1989 spaceport designated site encompassing ~463K acres
  - Provides Department of Defense (DoD) asset deployment and air-delivered weapons testing.
- **Cecil Spaceport** (Duval County / Jacksonville)
  - 2012 spaceport designation and encompasses over 6K acres
  - FAA-licensed for horizontal launch/landing activities with focus on manufacturing/testing/MRO operations
- **Space Coast Regional Airport** (Titusville / Brevard County)
  - 2020 spaceport designation and encompasses over 2K acres
  - FAA-licensed for horizontal launch/landings supporting corporate aviation, pilot training, & integrated logistics
- **Tyndall Air Force Base** (Bay County / Panhandle)
  - 2024 spaceport designated site encompassing 29K acres
  - Focus is high-speed aerospace infrastructure, military drone technologies, and simulated pilot training
- **Homestead Air Reserve Base** (Miami-Dade County)
  - 2024 spaceport-designated territory encompassing approximately 600 acres, with this report focused on the approximately 144-acre Parcels 7 and 9 development opportunity within the broader territory
  - Purpose is to attract advanced aviation maintenance and commercial defense/logistics technology developers

The subject site's location in Homestead provides several differentiating characteristics relative to the other spaceport-designated sites across the state. The following sections summarize the site's principal advantages, constraints, and opportunity areas.

MDC056

10.2.1. Key Advantages

- Geographic Position: Southern Anchor of Florida's Aerospace Network. Homestead is the only designated spaceport territory in South Florida and is the southernmost node in the statewide system. Other designated sites are concentrated in the northeast Florida/Brevard-Duval corridor or the northwest Panhandle, while Homestead is located within one of the most internationally connected metropolitan areas in the United States. This location provides several differentiating advantages:
    - *International Business Gateway*: The subject site is the only designated spaceport territory with close proximity to Miami's port and trade infrastructure, international finance community, and Latin American and Caribbean business relationships. These attributes may support tenant recruitment for aerospace supply-chain companies, satellite component manufacturers, and MRO operators with international market connections, particularly in Central and South America.
    - *Accessible Human Capital:* The South Florida tri-county area has a population of approximately 6.4 million residents, nearly three times the size of any other realistic spaceport labor market at competing sites. Homestead can offer prospective tenants access to a metro-scale labor market, a large multilingual workforce, and a regional university pipeline, all within a single designated territory.
- Existing Defense and Aerospace Tenant Base: As shown in Table 3 and Figure 10, Northrop Grumman and Lockheed Martin have an established presence at Homestead Air Reserve Base, including aircraft maintenance, upgrades, field sustainment, and information systems support. Existing aerospace, aviation, and defense tenants in nearby submarkets also provide a regional industry base that can support tenant recruitment and supply-chain development.
- Economic Development Profile: Jobs Pipeline for an Underserved Market. The site could support research, development, manufacturing, and defense-adjacent employment in a portion of the County that has historically had lower professional employment density than northern and coastal submarkets. The spaceport designation also provides a direct recruitment tool through statutory tax exemptions for certain machinery and equipment purchased by new or expanding businesses in a spaceport territory.

10.2.2. Key Disadvantages and Constraints

- No Immediate Launch Capability: Shortly after the 2024 spaceport designation, Space Florida CEO Rob Long stated that rockets would not be launched from the Homestead site for the foreseeable future. Additionally, the site's proximity to HARB makes security/access an important and necessary consideration, and access to HARB's runway should not be expected in the near term.
- Greenfield Ecosystem: Limited Existing Momentum. Unlike more established spaceport sites such as Cape Canaveral and Cecil Spaceport, Homestead does not yet have the same history of dedicated infrastructure investment, tenant clustering, or public-private aerospace activity. Attracting available financial incentives will require a master plan submitted to Space Florida, and many incentives are awarded through competitive processes. Attracting anchor tenants without pre-existing peer companies or a launch-activity-driven vendor ecosystem will require initial infrastructure investment, coordination across multiple stakeholders, and active tenant recruitment.

MDC057

10.2.3. Homestead Key Opportunities

Given these advantages and constraints, Homestead is best positioned for activities that do not require launch infrastructure but benefit from the site's location, labor market access, defense-adjacent setting, and international connectivity. Potential opportunity areas include the following:

- Aerospace Manufacturing and Component Supply Chain: Satellite components, drone and UAV components, avionics, and related manufacturing serving Latin American and Caribbean markets or supporting the growing launch cadence at Cape Canaveral.
- Maintenance, Repair and Overhaul (MRO): The active HARB installation and the existing presence of Northrop Grumman and Lockheed Martin support opportunities for non-runway-dependent MRO, sustainment, and related defense-support activities.
- Research and Development Hub: The site's proximity to the University of Miami, Florida International University, Miami-Dade College, and aviation-related education programs in Homestead provides a potential foundation for workforce development, applied research, and training partnerships.
- International Aerospace Commerce: As a gateway to Latin America, Homestead could support international aerospace company offices, regional headquarters, or joint-venture manufacturing operations serving Central American, South American, and Caribbean markets.
- Satellite Ground Support and Data Infrastructure: Proximity to Miami's data center and subsea cable ecosystem may make Homestead attractive for satellite ground station operations or data-support functions serving Southern Hemisphere orbital and communications markets.

In summary, Homestead's designation is best understood as a geographic extension of Florida's aerospace ecosystem into the state's most densely populated and internationally connected market. The opportunities best suited for Homestead complement, rather than duplicate, the launch-capable functions of Florida's more established spaceport sites. Within Space Florida's broader network, Homestead can serve as a South Florida commercial and defense-support node if the County advances the infrastructure, governance, and tenant-recruitment actions described in this report.

MDC058

11. Cost of Inaction

The subject site has been vacant for decades and, if the County does not advance the actions necessary to facilitate development, is likely to remain vacant. The cost of inaction is not limited to delayed development; it is the loss of leverage at the moment when leverage is highest. The Spaceport Territory designation, the County-controlled HARB Trust, the availability of FDOT/Space Florida funding, federal defense and economic development programs, and demonstrated market interest together create a narrow window in which local capital can be multiplied into a much larger public-private investment program. That value is realized only if each step in the implementation sequence is actively advanced: using available local funding as match, securing Miami-Dade County support, completing the technical and regulatory prerequisites for eligibility, and then competing for state and federal awards with a defined project and credible private partner. Delay does not preserve these opportunities; it erodes them. Competitive funding cycles continue, other Florida spaceport communities advance shovel-ready projects, and the Homestead site remains unable to convert its designation into programmed capital, infrastructure readiness, or tenant commitments.

The opportunity cost is equally significant. Without near-term action, the region risks another cycle of fragmented, ad hoc proposals that fail to resolve the core barriers identified in this report: infrastructure readiness, environmental and regulatory clearance, utility resilience, governance alignment, and a clearly defined aerospace market position. In that scenario, Miami-Dade County may retain the designation but lose the practical ability to compete for the very employers, grants, and catalytic investments the designation was intended to attract. The funding is there, the designation is there, and the market interest is there; what the region cannot afford is to allow the implementation window to close while competing communities organize around clearer projects, stronger applications, and faster execution. The strategic choice is therefore not whether the County can wait, but whether it is willing to accept the lost jobs, foregone outside capital, and diminished role in Florida's aerospace network that waiting would produce.

MDC059

12. Recommendations

This Master Development Vision Plan establishes a phased, three-tiered framework designed to transform the areas surrounding Homestead Air Reserve Base (HARB) into a premier, well-connected aerospace and economic engine for Miami-Dade County. Phase I (0–4 Years) focuses on stabilizing governance, securing $20 million in foundational HARB Trust funding, and mitigating environmental and utility risks to deliver an initial approximately 15-acre shovel-ready anchor parcel within the broader approximately 144-acre Parcels 7 and 9 development focus area. Phase II (Years 4–10) capitalizes on this momentum by synchronizing massive civil infrastructure work with proactive, targeted marketing campaigns to activate Building Zones 1 and 2. Finally, Phase III (Years 10+) drives long-term regional competitiveness by securing land continuity between critical parcels, attracting tier-1 defense contractors to the restricted fence line, and negotiating strategic runway access. The following implementation matrix outlines the precise timeline, responsibilities, and performance metrics required to execute this 10+ year vision systematically.

12.1. Phase I: Short-Term (0-4 Years)

Phase I focuses on establishing the governance, funding, and foundational infrastructure necessary to advance the HARB vision into a development-ready condition. Key actions include forming a dedicated task force, securing pre-development funding through the HARB Trust, and initiating critical environmental assessments and federal coordination efforts. Concurrently, early land use actions such as zoning overlay updates and master plan preparation are undertaken to ensure regulatory alignment. Infrastructure commitments, grant pursuits, and initial construction activities are prioritized to deliver essential roadway and utility improvements. By the end of this phase, the County would position the project for market readiness by securing a master developer and/or anchor tenant and certifying a shovel-ready anchor parcel. Table 4 summarizes the Phase I recommendations, metrics and milestones. Figure 11 illustrates the site clearing and conceptual infrastructure for Phase I.

As shown in Table 4, there are three (3) key actions that the County can take immediately which will generate momentum on the subject site. These actions, shaded in green below, consist of:

- Establishing the HARB Task Force
- Authorizing Pre-Development Funding
- Launching the Phase I Environmental Site Assessment (ESA)

Together, these three actions establish the decision-making structure, funding authority, and baseline due diligence needed to convert the Spaceport designation from a planning concept into an actionable, fundable implementation program.

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Table 4: Phase I Recommendations and Timeline

Phase & Timeline	Action Item	Thematic Pillar	Lead Entity & Partners	Potential Funding Source	Target Metric (KPI) & Milestones
PHASE I					
Phase I 0–3 Months	**Establish HARB Task Force**	Governance	Miami-Dade County Commission	County Budget	Task Force fully boarded and chartered within 3 months.
Phase I 0–6 Months	**Authorize Pre-Development Funding**	Governance	Miami-Dade County HARB Trust	County Budget and/or HARB Trust ($20M)	$20M capital cleared and allocated for early-stage engineering.
Phase I 0–6 Months	**Launch Phase I ESA**	Risk Mitigation	Task Force / Environmental Consultant	County Budget and/or HARB Trust ($20M)	Complete Phase I Environmental Site Assessment to map hot spots.
Phase I 0–12 Months	**Begin USFWS & NEPA Scoping**	Risk Mitigation	Task Force / Federal Agencies	HARB Trust	Issue federal scoping letters; establish environmental baselines.
Phase I 0-12 Months	**Implement HARB Zoning Overlay Updates**	Land Use	County Planning Staff	N/A	Evaluate and implement updates to HARB zoning overlay.
Phase I 12–24 Months	**Secure Utility Commitments**	Infrastructure	Task Force / Utility Providers	Private Utility Capital / HARB Trust	Execute capacity agreements aligned with SW 112th Ave extension.
Phase I 12–24 Months	**Procure & Submit Master Plan**	Land Use	Task Force / County Planning Staff	County Budget	Prepare site master plan; submit to Space Florida for approval.
Phase I 12–24 Months	**File SIP Application, EDA & Defense Grants**	Infrastructure	Task Force / Grant Writers	N/A (Application Phase)	Submit formal applications for FDOT SIP, OLDCC, and EDA funds.
Phase I 24–48 Months	**Execute Infrastructure Upgrades**	Infrastructure	Public Works / Civil Contractors	FDOT SIP / EDA / OLDCC Grants	Complete roadway access upgrades; install main water & sewer lines.
Phase I 24–48 Months	**Secure Parcel 7 Master Developer / Anchor Tenant**	Economic Dev.	Economic Development Agency	Public-Private Partnership (P3)	Issue RFP; execute a binding lease or development agreement with a master developer and/or major user.
Phase I 24–48 Months	**Certify Parcel 7 Shovel-Ready**	Economic Dev.	Task Force / Civil Engineers	Public-Private Partnership (P3)	Grade, clear, and connect utilities to the northwest 15-acre tract.

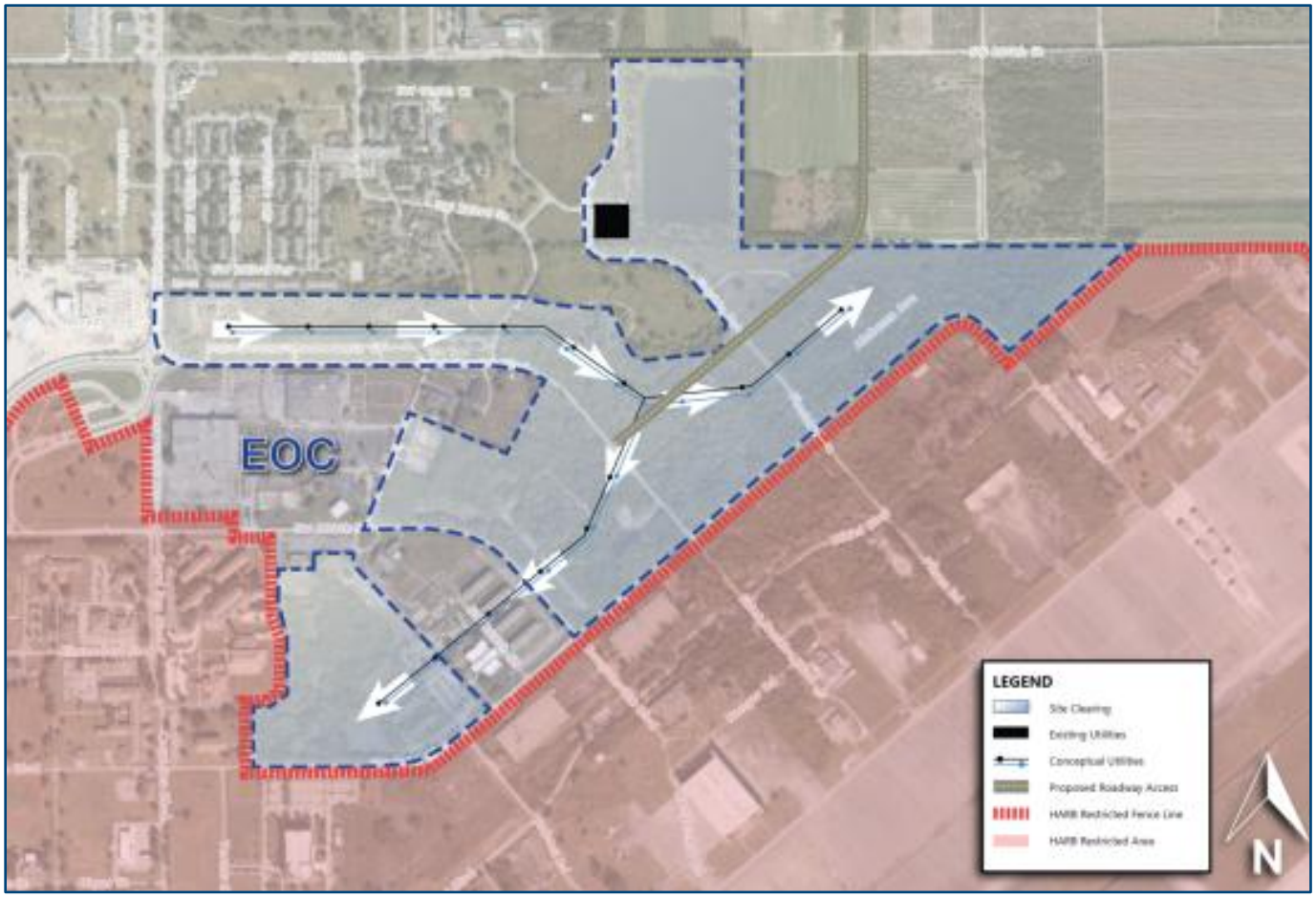


Figure 11: Phase I Improvement Map – Site Clearing and Conceptual Infrastructure

MDC062

12.2. Phase II: Mid-Term (4-10 Years)

Phase II builds upon the initial groundwork by advancing coordinated infrastructure delivery and vertical development while actively marketing the site to targeted industries. Strategic efforts focus on synchronizing roadway construction and site preparation to improve efficiency and reduce costs, while initiating development within key building zones located farther from the airfield. At the same time, targeted marketing campaigns are deployed to attract tenants in advance of project completion, ensuring a smooth transition from construction to occupancy. This phase emphasizes public-private partnerships and coordinated implementation to activate development across Zones 1 and 2.

Zones 1 and 2 are envisioned to support a range of light industrial and mixed industrial uses with building typologies that balance operational flexibility and proximity to the Homestead Air Reserve Base (HARB). In Zone 1, development can accommodate one- to four-story buildings with a maximum height of approximately 45 feet, allowing for greater flexibility in tenant mix and internal configurations, while still maintaining strict visual and operational controls, including prohibitions on direct viewpoints toward the base and roof access. Security measures in Zone 1 are comparatively lower, consisting of baseline background checks and monitored visitor access, reflecting its location farther from sensitive base operations. Zone 2 introduces a more transitional condition, with reduced building heights (generally one to two stories up to approximately 20–40 feet) and increased visual screening requirements, including limitations on upper-floor transparency. Security protocols in Zone 2 are moderately elevated, with more controlled access and stricter visitor authorization, reinforcing its closer relationship to HARB and the need to incrementally increase security and compatibility requirements across zones. Figure 12 illustrates the building typologies envisioned for Zones 1 and 2.

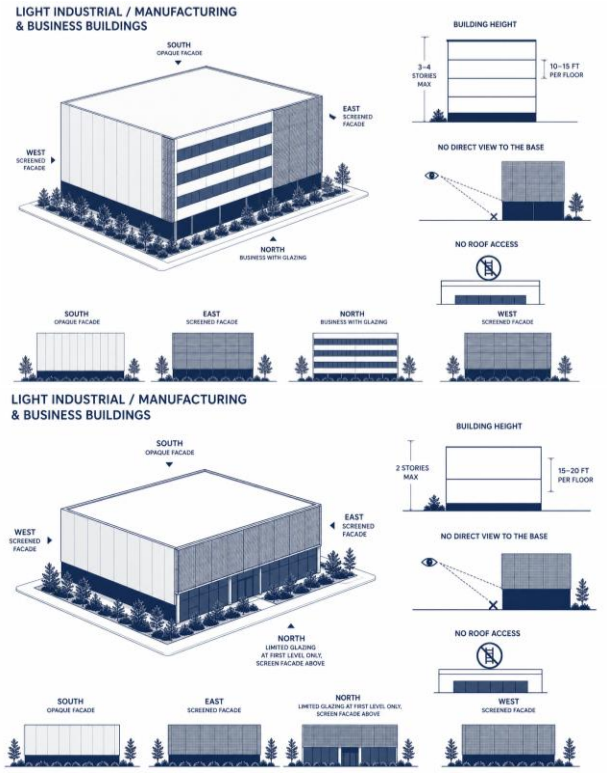


Figure 12: Zone 1 and 2 Building Typologies

Table 5 summarizes the Phase II recommendations, metrics and milestones. Figure 13 illustrates the building infill for Zones 1 and 2 as part of Phase II.

Table 5: Phase II Recommendations and Timeline

Phase & Timeline	Action Item	Thematic Pillar	Lead Entity & Partners	Potential Funding Source	Target Metric (KPI) & Milestones
Phase II					
Phase II Years 4–7	**Deploy Target Campaigns**	Economic Dev.	Economic Development Agency	Municipal Marketing Funds / P3	Launch targeted tenant attraction campaign 3 years before construction ends.
Phase II Years 4–10	**Synchronize Road & Site Work**	Infrastructure	Public Works / Contractors	FDOT SIP / Combined Capital	Construct SW 112th Ave extension simultaneously with Zones 1 & 2 clearing to cut costs.
Phase II Years 4–10	**Execute Zone 1 & 2 Development**	Land Use	Task Force / Private Developers	Private Capital / P3 Financing	Initiate vertical construction on parcels farthest from the HARB airfield.

MDC064

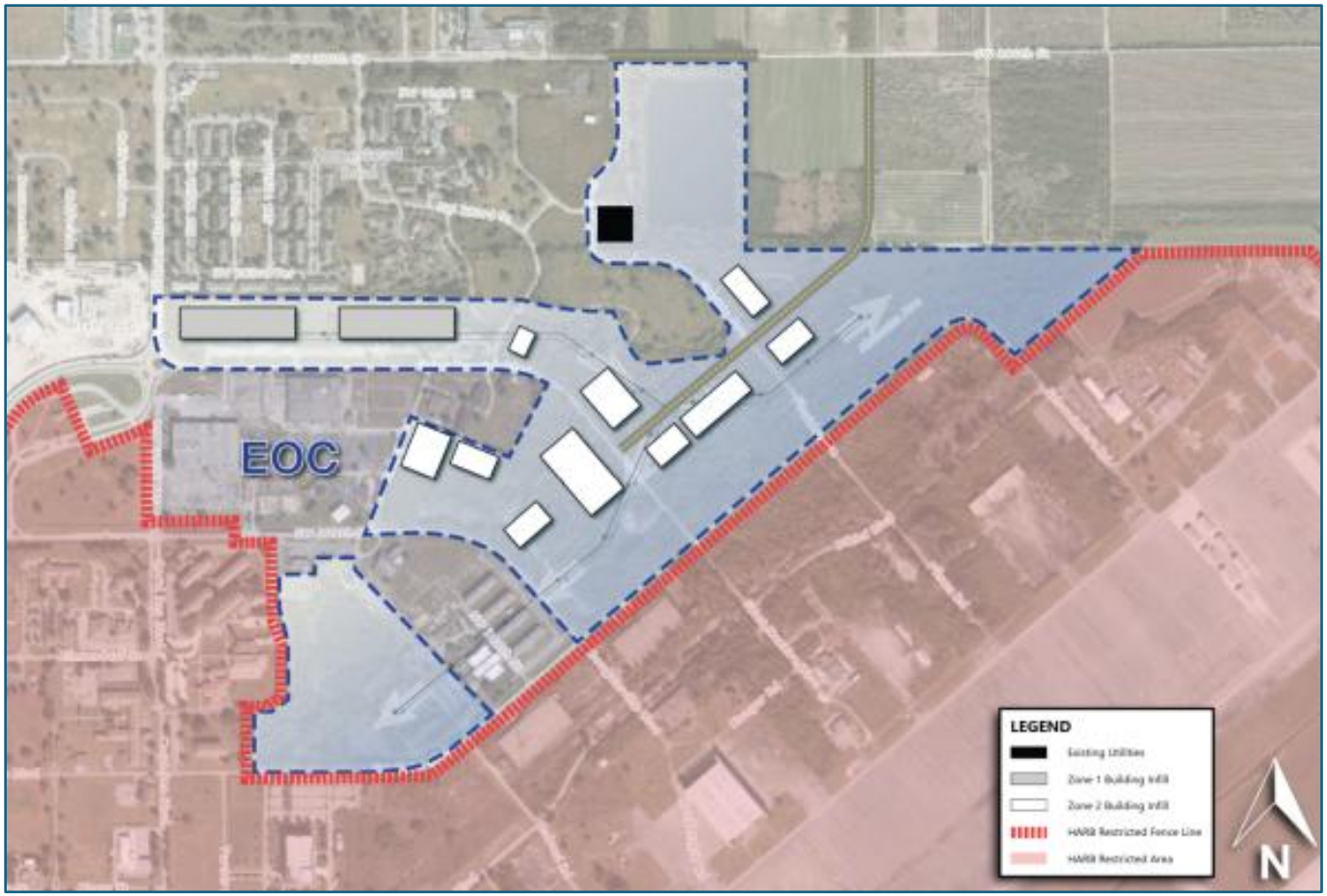


Figure 13: Phase II Improvement Map – Building Infill (Zones 1 and 2)

MDC065

12.3. Phase III: Long-Term (10+ Years)

Phase III advances long-term economic competitiveness by supporting full buildout and enhancing regional connectivity. This phase prioritizes the attraction of high-value aerospace and defense tenants through infill development along the restricted fence line, leveraging proximity to HARB operations. Strategic land acquisition efforts are undertaken to ensure continuity between key parcels, enabling a cohesive development pattern. Additionally, coordination with federal partners and base command focuses on securing runway or taxiway access, which is critical to supporting advanced aerospace uses. Collectively, these actions would support the site's long-term role as an aerospace-oriented employment district within Miami-Dade County's economic development framework.

Zone 3 represents the most restrictive development area and is intended exclusively for industrial, manufacturing, and mission-compatible aerospace uses that require the highest level of security and control. Building typologies in this zone are limited to single-story structures with maximum heights of approximately 30–35 feet, reflecting both operational safety considerations and federal compatibility constraints. Building design must eliminate any potential visual exposure to base operations, with no permitted windows oriented toward the base and no roof access. Security requirements in Zone 3 are significantly heightened, including rigorous background checks aligned with prime contractor standards and very limited, strictly controlled visitor access. These requirements reflect the zone's proximity to HARB and its location within more sensitive operational areas, where building form, site design, and user access must fully align with Department of Defense compatibility guidelines and aviation safety considerations, including AICUZ and FAA height restrictions. Figure 14 illustrates the building typologies envisioned for Zone 3.

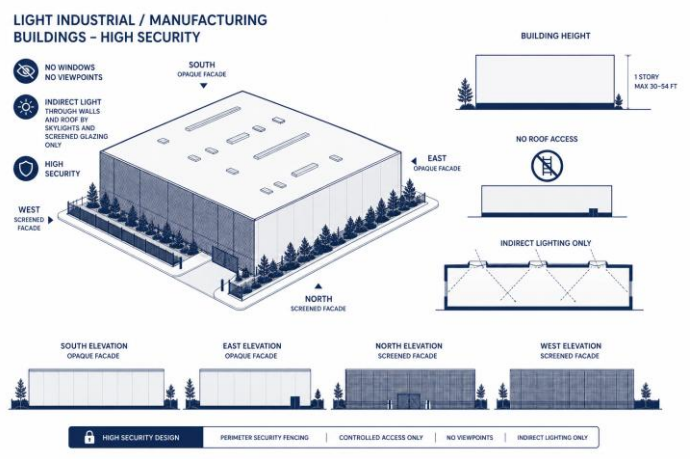


Figure 14: Zone 3 Building Typologies

Table 6 summarizes the Phase III recommendations, metrics and milestones. Figure 15 illustrates the building infill for all zones as part of Phase III.

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Table 6: Phase III Recommendations and Timeline

Phase & Timeline	Action Item	Thematic Pillar	Lead Entity & Partners	Potential Funding Source	Target Metric (KPI) & Milestones
Phase III					
Phase III Years 10+	**Infill Aerospace Development**	Economic Dev.	Task Force / Defense Contractors	Private Aerospace Capital	Construct facilities for tier-1 aerospace companies along the Restricted Fence Line.
Phase III Years 10+	**Pursue Parcel 8 Acquisition**	Land Use	Miami-Dade County / Task Force	Space Florida Bonds / Defense Grants	Acquire Parcel 8 to physically connect Parcels 7 and 9 for cohesive layout.
Phase III Years 10+	**Negotiate Runway Access**	Logistics	Task Force / HARB Command / USAF	SIP Funding	Secure joint-use or taxiway access agreements for direct runway connectivity.

Taken together, the findings and phased recommendations in this report provide Miami-Dade County with a clear implementation pathway to convert the HARB Spaceport Territory designation from a policy opportunity into an investment-ready aerospace and defense-support district. By acting early to establish governance, unlock local match funding, complete environmental and regulatory due diligence, and pursue coordinated state, federal, and private investment, the County can reduce development risk, strengthen HARB mission compatibility, and position Parcels 7 and 9 for long-term job creation and regional economic competitiveness. The recommended sequence is intentionally incremental, allowing near-term actions to build credibility and momentum while preserving flexibility for future market, infrastructure, and runway-access opportunities.

MDC067

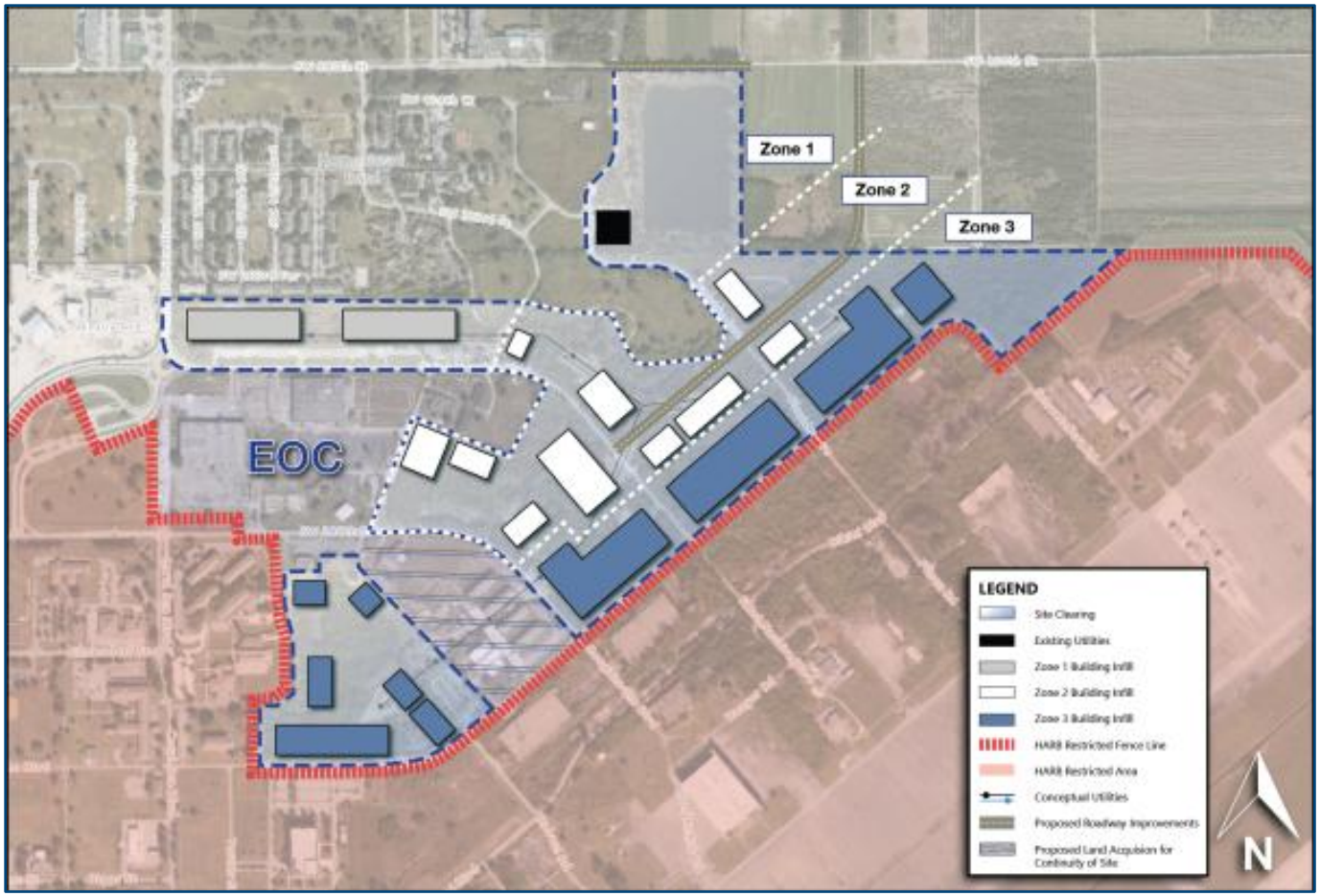


Figure 15: Phase III Improvement Map – Building Infill (All Zones)

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13. Appendix

13.1. Funding and Incentives

Table 7: Funding & Incentives Matrix

Program / Incentive	Type	Administering Entity	Eligible Costs & Funding Mechanism	Eligibility Requirements & Examples	Process & Timeline	Key Restrictions	Key Contacts
1. Spaceport Improvement Program (SIP)	Infrastructure Grant (up to 100% of cost)	FDOT / Space Florida	• Construction of launch/processing facilities • On-site roads, utilities, substations, pipelines • Site preparation & land development for aerospace tenants • Aerospace manufacturing/assembly buildings • PD&E and Design phases Funding: Reimbursement after construction; must invoice against approved phases	• Aerospace companies directly involved in launch, satellite mfg, spacecraft processing, or rocket production • Licensed spaceports, NASA, USSF Examples: SpaceX, Blue Origin, Airbus satellite mfg, ULA, Boeing Note: Generic manufacturing firms NOT eligible without direct aerospace nexus	• Jan–Apr: Annual application window • Submit to Space Florida (bsoat@spaceflorida.gov) • Space Florida scores & prioritizes projects • Approved projects enter FDOT 5-Year Work Program • Reimbursement follows construction completion Current cycle: FY 2027–2031 (deadline passed); next: Jan 2026 for FY 2028–2032	• Must be within designated spaceport territory • Must align with spaceport master plan — Homestead master plan NOT yet published (timing risk) • Applicant must have legal property access before funds obligated • Financial records subject to FL public records law (Ch. 119) • $750K+ requires state single audit	Brianna Soat, AICP bsoat@spaceflorida.gov (SIP Program Mgr) FDOT Spaceport Office fdot.gov/spaceport
2. Space Transportation Infrastructure Matching Fund	Reimbursement Grant (partial match)	Space Florida	• Same scope as SIP — infrastructure & construction • Can be layered with SIP for larger projects • Conduit financing optionally combined Funding: Reimbursement; PD&E/Design phases must be self-funded to show commitment	• Private aerospace companies with projects on spaceport territory • Same aerospace-nexus requirement as SIP Examples: Satellite manufacturers, rocket component producers, launch service providers	• Same Jan–Mar annual cycle as SIP • Submit to Steven Bostel: sbostel@spaceflorida.gov • Matching funds/financing must be identified at application • Construction funding requires completed PD&E first Current cycle: FY 2027–2031	• Sustainability/ROI demonstration required (land lease revenue, Space Florida ownership structure, etc.) • Project must show return to state via jobs, launches, or economic output • Same master plan alignment requirement as SIP	Steven Bostel sbostel@spaceflorida.gov Space Florida Planning & Development
3. International Aerospace Innovation Fund (IAIF) [SB 1516, eff. July 1, 2025]	Competitive R&D Grant	Space Florida	• R&D project funding • Workforce development programs • Commercialization initiatives • Space exploration, advanced manufacturing & infrastructure Funding: Direct grant award (not reimbursement); structured per grant agreement	• Florida-based aerospace companies partnering with international firms • Early-stage to growth-stage companies Examples: Advanced propulsion startups, satellite tech companies, space infrastructure developers	• Active since July 1, 2025 • Space Florida issues competitive Calls for Applications • Expert panel reviews and scores submissions • Space Florida board approval required Contact Space Florida for current solicitation status	• Must involve a Florida-based aerospace partner • Co-funding commitments and IP rights negotiated as part of award • Focus on 'critical technology areas' — generalist projects may not qualify	Space Florida Business Development businessdev@spaceflorida.gov (321) 730-5301

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Program / Incentive	Type	Administering Entity	Eligible Costs & Funding Mechanism	Eligibility Requirements & Examples	Process & Timeline	Key Restrictions	Key Contacts
4. Tax-Exempt Spaceport Facility Bonds (PABs) [One Big Beautiful Bill Act, eff. Jan. 1, 2026]	Tax-Exempt Bond Financing (federal IRC §142/146)	Federal / Municipal Bond Markets via Space Florida as conduit issuer	• Construction/renovation of spaceport facilities • Spacecraft manufacturing, assembly & repair • Launch/reentry operations & flight control facilities • Rocket manufacturing (unlike airport bonds, mfg IS covered) • Cargo handling and crew transfer infrastructure Funding: Upfront via bond proceeds at tax-exempt interest rates	• Any entity developing qualifying spaceport facilities • Private-use spaceports qualify — NO public use requirement • Broad definition includes mfg/assembly at or near spaceport Examples: Launch operators, satellite manufacturers, rocket mfg, cargo processing firms	• Effective January 1, 2026 • Engage bond counsel + underwriter familiar with PAB structures • Space Florida can serve as conduit issuer in Florida • Financial institutions have expressed active interest • Subject to state-level volume cap allocation Holland & Knight (E. Rojas) has published guidance on structure	• AMT bonds (Alternative Minimum Tax applies to individual holders) • State volume cap allocation required — competitive with other PAB users • Facility must meet IRC spaceport definition • Bonds secured by project revenues / leases — credit quality matters	Space Florida Business Development businessdev@spaceflorida.gov Bond Counsel: Edward Rojas Holland & Knight
5A. Conduit Financing	Pass-Through Debt Financing (municipal bond market access)	Space Florida (as conduit/special purpose entity)	• Facilities, equipment, and tooling • Infrastructure projects on spaceport territory • Repaid as long-term lease obligation Funding: Upfront via bond/loan proceeds; company repays over time as operating lease	• Aerospace companies operating on Florida spaceport territory • Broad aerospace definition — wider than SIP Examples: Any aerospace company needing capital-efficient access to equipment, manufacturing facilities, or tooling	• No fixed annual cycle — by arrangement with Space Florida • Contact businessdev@spaceflorida.gov to initiate • Space Florida structures deal on per-project basis • Can be combined with SIP, Matching Fund, or tax-exempt PABs	• Space Florida acts as conduit only — not a direct lender • Lender network and terms vary by deal • Can be combined with Matching Fund application (noted in SIP application form)	Space Florida Business Development businessdev@spaceflorida.gov
5B. Synthetic Leasing	Financial / Tax Structure (capex → opex conversion)	Space Florida	• New building facilities constructed on government-owned land ('Special Dirt') • Does NOT apply to equipment/tooling acquisition Funding: Company leases from Space Florida/gov entity; avoids large upfront capex; recovers financing costs	• Aerospace companies building new facilities on Special Dirt • Special Dirt = land owned by federal, state, or local gov (Homestead ARB + Miami-Dade parcels qualify) Examples: Any aerospace tenant building new facilities on government-owned portions of Homestead territory	• No fixed annual cycle — by arrangement • Space Florida verifies Special Dirt qualification first • Deal structured with Space Florida as owner, company as lessee Contact businessdev@spaceflorida.gov to initiate	• ONLY applies to new construction on Special Dirt • Equipment and tooling NOT eligible under this structure • Requires Space Florida ownership of land/improvements — may affect business flexibility	Space Florida Business Development businessdev@spaceflorida.gov
6A. Ad Valorem (Property Tax) Exemption	Ongoing Tax Exemption	Space Florida / FL Dept. of Revenue	• Eliminates annual property tax on facilities leased from government entity or Space Florida Funding: Ongoing savings (not a disbursement); property tax is simply not owed when leasing from qualifying gov entity	• Any company leasing facilities from Space Florida, Miami-Dade County, or federal government on spaceport territory • No aerospace-specific requirement — triggered by land ownership structure Examples: Any tenant on government-owned Homestead parcels	• Automatic when lease is structured through qualifying government entity • No application required beyond the lease arrangement itself • Ongoing benefit for duration of lease term	• Only applies when LEASING from government entity • Private fee-simple purchase of land eliminates this benefit • Verify qualifying ownership status of specific Homestead parcel before assuming eligibility	Space Florida Business Development businessdev@spaceflorida.gov FL Dept. of Revenue floridarevenue.com

MDC070

Program / Incentive	Type	Administering Entity	Eligible Costs & Funding Mechanism	Eligibility Requirements & Examples	Process & Timeline	Key Restrictions	Key Contacts
6B. Sales & Use Tax Exemptions	Ongoing Tax Exemption	FL Dept. of Revenue	• Industrial machinery & equipment for new/expanding business • Spaceport activity-related purchases (activities on spaceport territory directed by Space Florida) • Spaceflight vehicles and components (subject to program expiration dates) Funding: Ongoing savings at point of purchase (not a reimbursement)	• Businesses expanding or new to FL engaged in aerospace manufacturing or spaceport activities • Spaceport activity definition: activities directed/sponsored by Space Florida on spaceport territory Examples: Satellite component manufacturers, rocket part producers, spacecraft integrators	• File exemption certificates with FL Dept. of Revenue • Some exemptions require pre-qualification (e.g. new/expanding business certification) • Ongoing benefit once certified	• 'Spaceport activities' exemption requires Space Florida sponsorship/direction of activity • Some exemptions have sunset/expiration dates — verify current status • General manufacturing exemptions have output/investment thresholds	FL Dept. of Revenue floridarevenue.com Space Florida for spaceport activity certification
7. Capital Accelerator Program	Equity Access / Investor Introductions	Space Florida / FL Venture Forum	• Early-stage equity and venture capital access • R&D project co-funding (via Israel Innovation Authority partnership) Funding: Direct investment from third-party investors (not a grant); Space Florida facilitates introductions	• Early-stage to growth-stage aerospace companies in Florida or relocating to FL • R&D or commercialization focus Examples: Propulsion tech startups, small satellite companies, defense-adjacent aerospace innovators	• Ongoing — no fixed application cycle • Contact Space Florida to be introduced to FL Venture Forum program • Pitches and due diligence coordinated through FL Venture Forum network	• Space Florida does not provide the capital — facilitates access only • Israel Innovation Authority partnership focuses on Israeli-FL joint projects • Not suitable for late-stage or non-R&D companies	Space Florida Business Development businessdev@spaceflorida.gov FL Venture Forum flvf.com
8. FSTED Program — Seaport-Spaceport Grants [SB 1662, eff. July 1, 2025]	State Grant (FSTED Program)	FDOT / FSTED Council	• Construction of spaceport/space industry facilities on seaport property • Transportation infrastructure connecting a port to aerospace industries • Commercial shipbuilding and manufacturing on seaport property Funding: Grant award; seaport/spaceport nexus required for project location	• Entities developing facilities at the interface of seaport and spaceport operations • Commercial shipbuilders Examples: Port Canaveral-adjacent aerospace logistics; maritime launch support infrastructure	• Active since July 1, 2025 • Apply through FDOT FSTED program process • Included in FSTED Council's 5-year Florida Seaport Mission Plan Contact FDOT or Space Florida for coordination	• Project must have genuine seaport-spaceport interface — not applicable to inland Homestead parcels without maritime connection • Miami-Dade spaceport designation triggers restriction: seaport grants in Miami-Dade cannot fund non-space uses	FDOT Spaceport Office fdot.gov/spaceport Space Florida Business Development businessdev@spaceflorida.gov

Program / Incentive	Type	Administering Entity	Eligible Costs & Funding Mechanism	Eligibility Requirements & Examples	Process & Timeline	Key Restrictions	Key Contacts
9. Federal FAA / U.S. DOT Grants	Federal Grant	FAA / U.S. DOT (coordinated via Space Florida)	• Spaceport transportation infrastructure improvements • Access road and transportation connectivity projects • Dual-use military/commercial infrastructure (DoD channel available) Funding: Grant reimbursement; coordinated through FDOT work program submission	• Spaceport operating authorities, licensed spaceports, and aerospace partners submitting through Space Florida • Dual-use projects may access DoD channels given Homestead ARB military presence Examples: Licensed spaceport operators, launch support infrastructure developers	• Space Florida is the single point of contact (per §331.3011(3) F.S.) for federal aerospace funding • Applications for joint state/federal funding coordinated through Space Florida • FDOT 5-year work program submission triggers federal eligibility Tied to SIP application cycle (Jan–Mar)	• Homestead is not yet FAA-licensed — limits direct FAA spaceport grant eligibility until licensed • Federal grants subject to federal procurement/environmental requirements • DoD channel requires demonstrated military utility	Space Florida: bsoat@spaceflorida.gov FAA Office of Commercial Space Transportation faa.gov/space
10. EDA Grants	Federal Public Works Grant (typically 50% federal share)	U.S. Economic Development Administration	• Public works infrastructure supporting private job creation • Water, sewer, roadway, utility, and industrial site improvements • Typical awards roughly $150K–$2.5M; up to $30M for regional significance Funding: Reimbursement grant; local/non-federal match required	• Project must support job creation and private investment • Must align with regional Comprehensive Economic Development Strategy • Higher federal share may be available in economically distressed areas Examples: Phase 1 backbone infrastructure for aerospace/industrial tenants	• Prepare defined Phase 1 project scope and budget • Document local match, private commitment, and quantified job creation • Coordinate with regional CEDS and submit through EDA application process Timing should align with SIP/OLDCC grant strategy	• Federal funds generally cannot serve as non-federal match for other federal programs • Competitive and reimbursement-based • Requires strong job creation, local match, and private commitment documentation	U.S. Economic Development Administration Atlanta Regional Office / EDA Public Works Program Coordinate with regional CEDS administrators
11. OLDCC Grants	Federal Defense Community Infrastructure Grant (maximum request up to $20M per project)	Department of Defense Office of Local Defense Community Cooperation	• Community-owned infrastructure benefiting a military installation • Utility redundancy, wastewater, electrical hardening, roadway, and resilience improvements • FY 2026 DCIP capacity approximately $230M Funding: Competitive reimbursement grant; community match required	• Project must enhance military value, installation resilience, or quality of life • Requires installation support and documented military benefit • Strong fit for HARB resilience projects identified in regional strategy Examples: Wastewater connection south of HARB; electrical hardening and redundancy serving HARB and Aerospace Zone	• Define Phase 1 infrastructure scope as installation resilience • Secure HARB support and document community match • Prepare DCIP application package through OLDCC cycle Coordinate timing with SIP and EDA grant applications	• Must demonstrate clear military installation benefit • Requires installation support and community match • Federal funds generally cannot serve as non-federal match for other federal programs • Competitive and reimbursement-based	DoD Office of Local Defense Community Cooperation Defense Community Infrastructure Program Coordinate with HARB leadership and County task force

Disclaimer: This matrix is for informational purposes based on publicly available information as of March 2026. Program details and eligibility criteria are subject to change. Consult Space Florida and qualified advisors before making funding decisions.

MDC072

13.2. Airport Diagram

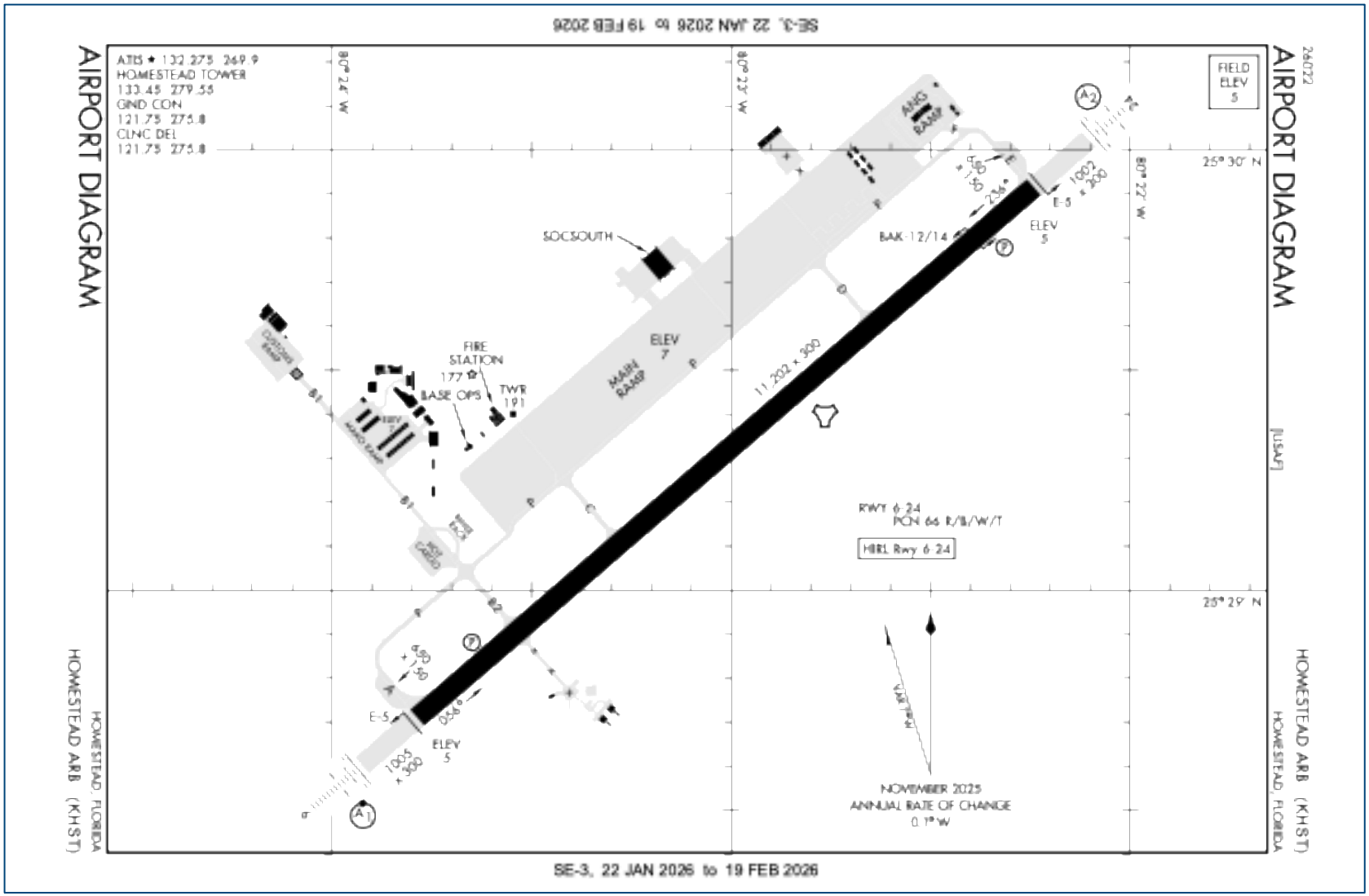


Figure 16: HARB Airport Diagram

MDC073

13.3. HARB Spaceport Site - Industrial Cost Estimates

Estimated Land Valuation: Although it is important for Miami-Dade County to retain ownership of the underlying land to support compliance with the requirements associated with the financial incentives available through the 2024 spaceport designation, an estimated land value is needed to evaluate the cost of capitalizing a ground lease for a prospective building owner or project developer.

Homestead - Industrial Land Comps

Project	Address	Developer	Date	Acres	Bldgs	Total SF	FAR Ratio	Sales Price	$/Acre	$/SF
Gateway South Dade	3175-3275 Park of Commerce Blvd.	Eastgroup	Apr-22	22.0	4	398,384	41.5%	$10,900,000	$494,937	$27
Homestead Commerce Park	1300, 1360, 1390 Park of Commerce Blvd.	Berkowitz	Dec-22	19.0	3	281,624	34.1%	$6,704,300	$353,602	$24
Racetrack Toy Collection (Condos)	1750 - 1770 SE 38th Avenue	E&M	Nov-21	4.0	2	70,392	40.4%	$1,750,000	$437,161	$25
Total/Average				**45.0**		**750,400**	**38.6%**		**$430,228**	**$26**

The chart above reflects local comparable land sales from 2021 and 2022. Although these transactions are somewhat dated, they provide a reasonable basis for estimating the value of the designated Zone 1 land within Parcel 7, as well as the remaining value of Parcels 7 and 9. The chart below summarizes the estimated market value of the 144-acre spaceport site comprising Parcels 7 and 9. Given the irregular configuration of the 144-acre site, particularly Parcel 7, and the uncertainty associated with potential environmental considerations, this analysis assumes an average floor area ratio (FAR) of 34 percent. This assumed FAR is below the typical industrial market standard of approximately 40 percent.

Based on these assumptions, Parcels 7 and 9 have a combined estimated value of approximately $63 million.

Spaceport Sites - Estimated Density & Value

Project	Acres	Land SF	Bldg SF	LAR	Est Value (Rounded)	$/Acre	$/SF
Parcel 7: Zone 1	15.4	672,750	269,100	40.0%	$8,000,000	$500,000	$30
Parcel 7: Zones 2 - 3	107.6	4,685,130	1,499,242	32.0%	$46,000,000	$430,000	$31
Parcel 9	21.0	914,760	347,609	38.0%	$9,000,000	$450,000	$26
Total/Average	**144.0**	**6,272,640**	**2,115,950**	**34.0%**	**$63,000,000**	**$441,746**	**$30**

Estimated Development Costs: The table below summarizes estimated development costs, including site work costs, with consideration given to the assumed FAR, irregular parcel configuration, and potential environmental considerations.

The cost information was informed by discussions with a senior industrial broker familiar with the subject site and competing industrial projects across South Dade, as well as an experienced industrial developer that has delivered more than 10 million square feet of Class-A industrial warehouse space across Miami-Dade County. The ULI Team also reviewed the projected return on cost for the Berkowitz development, Homestead Commerce Park, located southwest of the subject site, as a reasonableness check for the estimates presented below.

MDC074

HARB Spaceport Site - Industrial Cost Estimate Summary (Rounded)

Key Cost Assumptions*	$/SF
Site Work	$30.00
Hard Costs	$95.00
Tenant Improvements	$30.00
Lease Commissions	$7.50
Financing Costs	$10.00
Other Soft Costs	$10.00
Developer Fee	$7.50
Total Estimated Costs	**$190.00**

**Based on conversations with industrial developers and brokers.*

Site	Parcel 7 - Zone 1	Parcel 7 - Zones 2-3	Parcel 9	Total
Est Total Buildable SF	269,100	1,499,242	347,609	2,115,950
Land Value*	$8,000,000	$46,000,000	$9,000,000	$63,000,000
Site Work**	$8,000,000	$45,000,000	$10,000,000	$63,000,000
Building Shell	$26,000,000	$142,000,000	$33,000,000	$201,000,000
Tenant Improvements	$8,000,000	$45,000,000	$10,000,000	$63,000,000
Lease Commissions	$2,000,000	$11,000,000	$3,000,000	$16,000,000
Financing Costs	$3,000,000	$15,000,000	$3,000,000	$21,000,000
Other Soft Costs	$3,000,000	$15,000,000	$3,000,000	$21,000,000
Developer Fee	$2,000,000	$11,000,000	$3,000,000	$16,000,000
Total Estimated Costs	**$60,000,000**	**$330,000,000**	**$74,000,000**	**$464,000,000**
Return-On-Cost	**6.4%**	**6.5%**	**6.7%**	**6.5%**

**Capitalized ground lease. MDC retains land ownership.*

***$115M total Zone 1captial investment reference includes $60M Zone 1+$55M for site work of remaing land.*

MDC075

13.4. List of Organizations Hired by DoD and/or with Adjacency to Florida Spaceport

Organizations	Country	Payloads	FL Spaceport	Near HARB?	HARB possibility?
ACR Electronics	United States		No, Fort Lauderdale Florida		Yes, Avionics
Aerojet Rocketdyne	United States		Cape Canaveral Spaceport	No	
AEVUM	United States	Yes	Cecil Spaceport	No	
Airbus U.S. Space and Defense	EU	Yes	Cape Canaveral Spaceport	No	
Airgas, an Air Liquide company	United States		Cape Canaveral Spaceport, Cecil Spaceport		
Amentum	United States		Cape Canaveral Spaceport		
Aselsan	Turkey	Yes	No, uses launch facilities at Cape Canaveral Spaceport when needed		No
AST Space Mobile	United States	Yes	Cape Canaveral Spaceport	Yes, in Miami Dade	
Astra Space	United States		Unknown	No	
Avidyne	United States		No, at MLB - Melbourne International Airport	No	Yes, Avionics
Babcock International Group	United Kingdom		Space Coast Regional Airport and Spaceport		
BAE Systems	United Kingdom	Yes	No, at Jacksonville FL and deliver to Kennedy Space Center	No	
Blue Origin	United States		Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)	No	
Boeing	United States	Yes	Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport), Cecil Spaceport	Yes in Miami Dade	Yes, based on roundtable discussion
Booz Allen Hamilton	United States		No, at Panama City Beach, FL	No	
CACI	United States		No, Central Florida but supports Cape Canaveral Space Force Station	No	
Collins Aerospace (subsidiary of RTX Corporation)	United States		No, Melbourne and Jacksonville Area	No	Yes, Avionics
Dassault Aviation	France		No, at MLB - Melbourne International Airport and Stuart	No	
Elbit Systems	Israel		No, De Leong Springs, FL; Boca Raton, FL; Tallahassee, FL	No	
Embraer	Brazil		Space Coast Regional Airport and Spaceport (Exploration Spaceport), MLB and Fort Lauderdale	No	

MDC076

Organizations	Country	Payloads	FL Spaceport	Near HARB?	HARB possibility?
Fibre Glast Developments Corp	United States		No	No location in FL	Yes
Garmin	United States		No	No	Yes, Avionics
General Dynamics	United States	Yes	No, Orlando and Jacksonville/ Mayport	No	
General Electric (GE Aerospace)	United States	Yes	Near Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport), Jacksonville, Fort Lauderdale	No	
Hermeus	United States		Cecil Spaceport	No	
HII (Huntingtion Ingalls Industries)	United States		No, Panama City		
Honeywell International	United States		No, Clearwater locations supports Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport), and Orland-Sanford International Airport (SFB), smaller branches throughout FL	No	Yes, Avionics
IAP Worldwide Services	United States		Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport), Offices in Panama	No	
Israel Aerospace Industries	Israel		Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)	No	
KBR	United States		Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport); support at Eglin Air Force Base	No	
King Aerospace	United States		No	No	
KNDS	EU		No	No	
L3Harris	United States	Yes	No, Palm Bay FL near CCSFC	No	
Leidos	United States		Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)	No	
Lockheed Martin	United States	Yes	Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)	No	Yes, also they do avionics
MBDA (European Missile Manufacturer)	EU		No	No	
Northrop Grumman	United States	Yes	Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport); Melbourne , Orlando, and Tampa area.	No	

MDC077

Organizations	Country	Payloads	FL Spaceport	Near HARB?	HARB possibility?
Northrop Grumman	United States	Yes	Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport); Melbourne , Orlando, and Tampa area.	No	
OneWeb Satellites (owned by Airbus)	United States	Yes	Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)		
Otto Aerospace	United States		Cecil Spaceport		
Rolls-Royce Holdings	United Kingdom		No	No	
RTX Corporation (Raytheon)	United States	Yes	Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)		
Safran	France		No, Sarasota, Miami, Deerfield Beach, Milton	Yes in Miami Dade	Yes, Avionics
Science Applications International Corporation	United States		Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)	No	
Space Perspective	United States		Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)		
SpaceX	United States	Yes	Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)		
Teledyne Technologies			No, but several locations throughout FL		Yes, Avionics
Textron	United States	Yes	No, Tampa	No	
Thales Group	France	Yes	In Melbourne near and uses Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)	No	Yes, Avionics
Torch Technologies	United States		Eglin Air Force Base	No	
TransDigm Group	United States		No, acquired company in Melbourne	No	
United Launch Alliance (ULA)	United States	Yes	Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport)		
Vectrus	United States		Cape Canaveral Spaceport, Space Coast Regional Airport and Spaceport (Exploration Spaceport); Jacksonville	No	

MDC078

13.5. Reference Links

Type	Name	Link
Website	Spaceport Florida	https://www.spaceflorida.gov/spaceport-system-territory
Website	HARB	https://www.homestead.afrc.af.mil
Website	ArcGis Bat	https://www.arcgis.com/home/item.html?id=9f82cfa0beec46eebafbc370731c937e
Website	Space FL Act	https://www.leg.state.fl.us/statutes/index.cfm?App_mode=Display_Statute&URL=0300-0399/0331/0331.html
Website	OIED	https://www.miamidade.gov/global/economy/innovation-and-economic-development/home.page
Report	FDOT Spaceport 2018	https://fdotwww.blob.core.windows.net/sitefinity/docs/default-source/content/aviation/publications/faw-147-spaceport-handbook.pdf?sfvrsn=7d8f824b_0
Bill	Bill # HB 577	https://www.flsenate.gov/Session/Bill/2024/577/Analyses/h0577c.LFS.PDF
Bill	Bill # HB 968	https://www.flsenate.gov/Session/Bill/2024/968
Website	SpaceFlorida	https://www.spaceflorida.gov
Report	FDOT Spaceport 2025	https://fdotwww.blob.core.windows.net/sitefinity/docs/default-source/spaceports/fdot-spaceport-improvement-program-(sip)-handbook-2025-2026.pdf?sfvrsn=44c6de87_1
Website	FL Council of 100	https://fc100.org
Website	U.S. Southern command	https://www.southcom.mil/About/
Website	Sand Flax	https://www.fws.gov/media/sand-flax-endangered-florida-endemic
Website	HICO	https://www.earthdata.nasa.gov/data/instruments/hico
Website	EPA Superfunds	https://cumulis.epa.gov/supercpad/SiteProfiles/index.cfm?fuseaction=second.Cleanup&id=0404746#bkground
Website	SkyVector	https://skyvector.com
Website	MCD Homeless Trust	https://www.homelesstrust.org/homeless-trust/home.page
Website	Spaceport Improvement Program Guidelines	https://fdotwww.blob.core.windows.net/sitefinity/docs/default-source/spaceports/fdot-spaceport-improvement-program-%28sip%29-handbook-2025-2026.pdf?sfvrsn=44c6de87_1
Website	Spaceport America	https://www.spaceportamerica.com/wp-content/uploads/2025/04/02._SA_Master_Plan_2025.04.07_FINAL_Reduced.pdf
Report	HARB Air Installation Compatible Use Zone (AICUZ) Study	Homestead ARB AICUZ_FINAL_DEC 2020.pdf
Bill	County Resolution - EDC Agreement with HARB	041700.pdf
Website	Chapman Partnership Homeless Assistance Programs	Programs Services < Chapman Partnership
Bill	County Resolution - DOL Surplus Sites	232024.pdf
Report	South Florida Military Installation Resilience Review	South Florida Military Installation Resilience Review - SFRPC
Website	Spaceports in America	https://www.faa.gov/space/spaceports_by_state
Website	Opportunity Zone 2.0 (with potential expansion map)	Opportunity Zones Program - FloridaJobs.org

MDC079

May 27, 2026

To South Miami-Dade's Public, Private, Education, and Community Partners:

South Miami-Dade is positioned to become one of Florida's most important long-term economic growth corridors and one of Miami-Dade County's most promising locations for HARB mission-compatible aerospace, aviation, advanced manufacturing, logistics, and defense-support investment. Your EDC has worked closely with FIU's Jorge Perez Metropolitan Center to provide critical data to share for the benefit of economic growth in our region.

The Competitive Assessment confirms that South Miami-Dade has entered a new stage of economic opportunity. The region's population growth, expanding workforce, available land, transportation access, infrastructure investment, and recent Spaceport Territory designation create a rare opportunity to move from planning to targeted implementation. The assessment also makes clear that South Miami-Dade can evolve from a primarily residential and service-oriented area into a stronger regional economic engine. That future will depend on the region's ability to attract and grow higher-wage industries, prepare industrial and commercial sites for investment, align workforce programs with employer demand, and coordinate public and private resources around a focused set of strategic priorities.

The Economic Development Council of South Miami-Dade (EDC) will play a critical role in helping to lead and coordinate this next phase of regional growth. As a connector between business, government, workforce, education, and community stakeholders, the EDC provides an important platform for strategic collaboration, industry engagement, business advocacy, and implementation support necessary to move these opportunities forward in a disciplined and measurable way.

Aerospace and aviation represent one of the most significant opportunities. Miami-Dade County's aerospace manufacturing sector has grown rapidly since 2017 and is now one of the county's fastest-growing advanced manufacturing sectors. South Miami-Dade's combination of Homestead Air Reserve Base, Spaceport Territory designation, county-owned land, aviation-support potential, logistics connectivity, and proximity to the broader Miami-Dade economy provides a strong foundation for a focused aerospace and defense-support corridor.

However, the Spaceport Territory designation should be viewed as a strategic platform for action—not an endpoint. Realizing its full value will require compatible land-use planning, infrastructure-ready sites, high-capacity utilities, transportation improvements, broadband and fiber connectivity, specialized workforce development, and strong partnerships among local government, Space Florida, educational institutions, private industry, defense-related stakeholders, and the EDC.

The Competitive Assessment identifies several priorities that should guide the next phase of work:

- Advancing mission-compatible aerospace, aviation, maintenance, repair and overhaul, advanced manufacturing, logistics, and defense-support industries
- Preparing shovel-ready and infrastructure-ready sites within and near the Spaceport Territory
- Aligning workforce programs with aerospace manufacturing, aviation maintenance, engineering, cyber, logistics, construction, and skilled trades

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- Investing in water, wastewater, power, transportation access, specialized transport, broadband, and fiber connectivity
- Strengthening business recruitment, retention, and expansion efforts in targeted traded industries
- Creating a regional implementation structure with measurable benchmarks and clear accountability
- Building a stronger regional brand for South Miami-Dade as a dual-use aerospace, logistics, and advanced-industry corridor

Achieving these priorities will require sustained coordination and regional leadership. The EDC is uniquely positioned to help convene stakeholders, support implementation strategies, align regional priorities, and advocate for the investments necessary to strengthen South Miami-Dade's long-term competitiveness.

The assessment also identifies challenges that must be addressed directly. These include the region's jobs-housing imbalance, workforce-skill gaps, limited industrial land, infrastructure capacity constraints, housing affordability, and competition from other aerospace, logistics, and manufacturing markets. These challenges should not slow the effort; they should define the implementation agenda.

Growth is coming to South Miami-Dade. The question is whether that growth will be managed passively or shaped deliberately to produce higher-wage jobs, stronger career pathways, greater private investment, improved infrastructure, and long-term protection of the region's unique communities and ecology.

With disciplined execution and continued collaboration among government, education, workforce, defense, private-sector partners, and the EDC, South Miami-Dade has the potential to become:

- A nationally recognized aerospace, aviation, logistics, and advanced-manufacturing corridor
- A mission-compatible partner to Homestead Air Reserve Base and Florida's broader aerospace economy
- A leader in workforce and skilled-trades development
- A competitive industrial and manufacturing market
- A resilient and diversified regional economy
- A major driver of economic growth within Miami-Dade County and the State of Florida

The opportunity is substantial, but the next phase must be practical, disciplined, collaborative, and measurable. The Competitive Assessment should serve as the foundation for an implementation-driven strategic plan that identifies priority sites, target industries, infrastructure gaps, workforce partners, funding opportunities, and performance benchmarks.

The focus now must shift from planning to implementation, partnership, and measurable action.

Respectfully,

Lisa Greer

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South Miami-Dade Strategic Plan

Executive Summary and Strategic Next Steps

Executive Summary

South Miami-Dade is positioned at a pivotal moment in its economic evolution. The region possesses a unique combination of strategic assets, including significant population growth, available developable land, expanding infrastructure investments, proximity to global logistics corridors, emerging aerospace and advanced manufacturing opportunities, and growing workforce development capacity. Collectively, these factors create a strong foundation for long-term economic competitiveness and transformational regional growth.

The Competitive Assessment establishes a comprehensive analytical framework for understanding South Miami-Dade's current economic position, future opportunities, and critical challenges. The assessment demonstrates that while the region has experienced meaningful economic and demographic growth, substantial opportunities remain to better align workforce development, infrastructure investment, industry recruitment, and public-private collaboration to maximize economic impact.

A major finding of the assessment is that South Miami-Dade possesses the ability to evolve from a traditionally residential and service-oriented submarket into a more diversified regional economic engine driven by aerospace, logistics, advanced manufacturing, innovation, technology, construction, healthcare, education, and trade-related industries.

The designation of portions of South Miami-Dade as Spaceport Territory, combined with the presence of Homestead Air Reserve Base (HARB), regional transportation connectivity, workforce availability, and underutilized industrial potential, creates a rare strategic advantage that few regions nationally can replicate. These assets position South Miami-Dade to compete more aggressively for aerospace manufacturing, aviation support industries, defense-related investment, supply-chain operations, and high-wage advanced manufacturing employment.

The assessment further identifies several strategic economic realities:

- Population growth has accelerated throughout South Miami-Dade since 2017.
- Workforce participation and educational attainment continue to improve but remain uneven across portions of the region.
- Industrial and logistics demand is increasing due to broader South Florida growth trends.
- Significant opportunities exist to better connect residents to higher-wage employment pathways.
- Public and private investment activity must accelerate to fully capitalize on regional growth opportunities.
- Infrastructure, housing affordability, workforce readiness, and transportation capacity remain long-term competitive considerations.

The principal challenge moving forward will be generating sustained public and private economic development investment activity capable of transforming South Miami-Dade into a more competitive, resilient, and diversified regional economy.

To accomplish this objective, regional leadership must continue fostering strategic collaboration among municipalities, educational institutions, workforce organizations, industry leaders, developers, infrastructure providers, state agencies, and community stakeholders.

Equally important will be maintaining a disciplined implementation structure focused on measurable outcomes, investment attraction, workforce alignment, regional branding, and infrastructure readiness.

The Competitive Assessment provides a strong foundation for these next steps and positions South Miami-Dade to advance a coordinated economic development strategy centered on innovation, workforce opportunity, regional competitiveness, and long-term economic sustainability.

Key Strategic Findings

1. Aerospace and Aviation Represent Transformational Growth Opportunities

South Miami-Dade possesses several competitive advantages that position the region for continued aerospace and aviation sector growth, including:

- Homestead Air Reserve Base proximity
- Spaceport Territory designation
- Existing aerospace manufacturing growth trends
- Regional transportation access
- Available industrial development potential
- South Florida's international connectivity

The aerospace and aviation sectors should be treated as foundational strategic industries capable of generating high-wage employment opportunities and long-term economic diversification.

2. Workforce Development Must Remain Central to Economic Strategy

The region's long-term competitiveness will depend heavily on its ability to align workforce training, educational attainment, career pathways, and employer needs.

Priority workforce focus areas should include:

- Skilled construction trades
- Aerospace and aviation technologies
- Advanced manufacturing
- Logistics and supply chain operations
- Healthcare and technical professions
- Technology and innovation sectors

Public-private workforce partnerships will be essential to improving labor force participation and reducing workforce mismatch challenges.

3. Industrial and Logistics Growth Will Continue Expanding Southward

As land constraints and pricing pressures intensify in northern Miami-Dade County, South Miami-Dade is increasingly positioned to absorb future industrial, warehousing, logistics, and manufacturing growth.

This trend creates opportunities for:

- Industrial redevelopment
- Business recruitment
- Infrastructure investment
- Commercial tax base expansion
- Job creation
- Supply-chain support industries

4. Regional Coordination Will Be Critical

Long-term success will require continued alignment among:

- Municipal governments
- Miami-Dade County
- Economic development organizations
- Educational institutions
- Workforce providers
- Private industry
- Infrastructure stakeholders
- Community organizations

A fragmented regional approach could limit competitiveness and reduce the effectiveness of future investment attraction efforts.

5. Infrastructure Readiness Will Shape Future Competitiveness

Transportation, utilities, housing availability, broadband access, resiliency planning, and industrial site readiness will significantly influence South Miami-Dade's ability to compete for future investment.

Proactive infrastructure planning should remain a priority across all strategic initiatives.

Critical Challenges

Workforce Mismatch

Despite population growth, portions of South Miami-Dade continue experiencing gaps between workforce skills and available higher-wage employment opportunities.

Housing Affordability

Housing affordability pressures may increasingly affect workforce retention and business competitiveness.

Infrastructure Constraints

Roadway congestion, transportation limitations, utility expansion needs, and resiliency concerns could impact long-term growth potential.

Uneven Economic Investment

Certain areas within South Miami-Dade continue to experience lower levels of private investment and economic opportunity.

Regional Competition

South Miami-Dade must compete aggressively with other Florida and national markets for investment, talent, and industry recruitment.

Strategic Opportunities

Aerospace and Defense Ecosystem Expansion

Leverage Spaceport Territory designation and HARB proximity to attract aerospace suppliers, aviation maintenance operations, advanced manufacturing, and defense-related industries.

Workforce Pipeline Development

Expand partnerships with:

- Technical schools
- Colleges and universities
- Workforce boards
- Apprenticeship programs
- Industry-led training initiatives

Industrial Site Readiness

Identify and prioritize industrial and commercial sites for infrastructure investment and development readiness.

Public-Private Investment Partnerships

Develop stronger partnerships among municipalities, developers, educational institutions, and private industry to support catalytic economic initiatives.

Regional Branding and Marketing

Strengthen South Miami-Dade's external positioning as:

- A business growth market
- An aerospace opportunity corridor
- A logistics and industrial expansion region
- A workforce development leader
- A strategic innovation hub

Recommended Strategic Next Steps

Phase 1 – Final Strategic Plan Refinement (0–60 Days)

Phase 2 – Strategic Implementation Framework (60–120 Days)

1. Establish Regional Strategic Priorities

Identify and formally adopt a limited number of measurable strategic priorities such as:

- Aerospace growth
- Workforce development
- Industrial recruitment
- Infrastructure investment
- Small business growth
- Innovation and technology expansion

2. Develop Measurable KPIs

Establish measurable benchmarks including:

- Job creation targets
- Wage growth targets
- Industrial square footage growth
- Workforce participation increases
- Educational attainment improvements
- Investment attraction metrics
- Business retention outcomes

3. Create an Economic Development Action Matrix

Develop a detailed implementation matrix identifying:

- Lead organizations
- Supporting partners
- Funding sources
- Timelines
- Deliverables
- Accountability measures

4. Build Industry-Specific Action Plans

Create focused implementation strategies for:

- Aerospace and aviation
- Logistics and distribution
- Advanced manufacturing
- Healthcare
- Construction and skilled trades
- Innovation and technology sectors

Phase 3 – Regional Investment and Advocacy Strategy (120–240 Days)

1. State and Federal Funding Alignment

Use the strategic plan to pursue:

- Infrastructure grants
- Workforce development funding
- Aerospace and defense opportunities
- Transportation investment
- Economic resiliency funding
- Innovation and technology grants

2. Investment Recruitment Campaign

Develop a targeted business recruitment strategy focused on:

- Aerospace suppliers
- Aviation support industries
- Industrial developers
- Advanced manufacturing firms
- Logistics operators
- Technology companies

3. Regional Branding Initiative

Launch a coordinated branding and marketing campaign positioning South Miami-Dade as:

- South Florida’s growth frontier
- An aerospace and innovation corridor
- A workforce development leader
- A logistics and manufacturing opportunity market
- A resilient long-term investment environment

4. Infrastructure Readiness Initiative

Coordinate with infrastructure stakeholders to prioritize:

- Transportation improvements
- Utility expansion
- Broadband connectivity
- Industrial site readiness
- Workforce housing strategies
- Resiliency investments

Governance and Accountability Recommendations

Establish a Strategic Implementation Steering Committee

The Steering Committee should include representation from:

- Municipal leadership
- Miami-Dade County
- Economic development organizations
- Educational institutions
- Workforce providers
- Private industry
- Infrastructure agencies
- Community organizations

Quarterly Performance Reviews

Conduct quarterly implementation reviews focused on:

- KPI performance
- Funding opportunities
- Investment attraction activity
- Workforce progress
- Infrastructure advancement
- Emerging economic trends

Annual Strategic Plan Updates

Update the strategic framework annually to reflect:

- Market conditions
- Industry trends
- Demographic shifts
- Legislative changes
- Infrastructure developments
- Economic performance outcomes

Final Conclusion

South Miami-Dade possesses the assets, geographic advantages, workforce potential, and strategic positioning necessary to emerge as one of Florida's most important long-term economic growth corridors.

The Competitive Assessment establishes a strong analytical and strategic foundation for this transformation.

The next phase will require disciplined implementation, coordinated leadership, infrastructure investment, workforce alignment, and sustained public-private collaboration.

If effectively executed, South Miami-Dade has the potential to become:

- A nationally recognized aerospace and logistics corridor
- A leader in workforce and skilled trades development
- A competitive industrial and manufacturing market
- A resilient and diversified regional economy
- A major driver of future economic growth within Miami-Dade County and the State of Florida

The region's opportunity is substantial. The focus now must shift from analysis to coordinated implementation and measurable action.

Prepared for :

EDC South Miami-Dade

Competitive Assessment South Miami-Dade County

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EXECUTIVE SUMMARY

The *South Miami-Dade County Competitive Assessment* provides data analytics and a supporting narrative of the region's economic strengths, opportunities, and challenges to be addressed in the subsequent economic development strategic plan. **The Competitive Assessment findings show the South Miami-Dade region has significant economic potential given the substantial growth in its worker-age population over the last two decades, presence of key advanced industry sectors, including aerospace manufacturing, and recent designation of the Homestead Air Reserve Base (HARB) and surrounds as Spaceport Territories.** The principal challenge going forward will be to generate a heightened level of economic development public and private investment activity that will elevate South Miami-Dade to the status of an economically competitive region.

Regional Context: At Home in a Dynamic Florida County

Future economic growth in South Miami-Dade will largely depend on the structure, strengths and leadership of Miami-Dade County. South Miami-Dade businesses and workers will continue to be employed, grow, and trade within the network of businesses in the greater county and South Florida economies. Small businesses, those employing 20 employees or less, especially depend on the network of businesses, services, and industries within the region for growth and expansion.

Miami-Dade County's economic strengths provide continued opportunities for South Miami-Dade. Miami-Dade County is a highly competitive economy in a range of industry sectors, including healthcare, education, transportation, and tourism and hospitality. The distinguishing characteristics of Miami-Dade County's economy include:

- ***Economic Scope*** - Miami-Dade County has the largest and most diversified economy in the State of Florida with a gross domestic product (GDP) of over $219 billion, an estimated 123,830 employer business establishments and 1,525,512 employer and self-employed jobs;
- ***A Diversified Industry Structure*** - In addition to healthcare, education, transportation, and leisure and hospitality, Miami-Dade County is home to growing technology sectors and employment in a wide range of high-end professional services, financial services, construction services and support, and manufacturing, especially aerospace components;
- ***Traded Industries*** - Miami-Dade County's top 10 traded industries are concentrated in industries requiring advanced education and/or professional skills, including management of companies and enterprises, legal services, management and technical consulting services, architectural and engineering services, and computer systems design and related services;
- ***Growing Presence in the Advanced Industry Sector*** - The advanced industries sector encompasses 50 industries with the highest levels of skills, knowledge, growth, and value-added productivity. Advanced industries range from manufacturing such as automotive and aerospace to high-tech services such as computer software and computer system design. Advanced industries are also deeply engrained with technology research and development (R&D) and STEM (science, technology, engineering, and math). Both Miami-Dade County and South Miami-Dade are home to a growing number of establishments and workers in the advanced industry sector with business

establishments largely found in management, scientific, and technical consulting services, architectural and engineering, and computer systems design; and

- ***Foreign Trade Zone 32 & 281*** – Businesses conducting operations within Foreign Trade Zones (FTZs) or subzones – granted through the Greater Miami Chamber of Commerce (FTZ 32) or PortMiami (FTZ 281) – receive various benefits, including duty and tax deferrals and reductions. These advantages provide companies with opportunities to improve cash flow and enhance competitiveness.

Combined Population and Resident Worker Growth

South Miami-Dade County has experienced rapid population growth over the past two decades. This occurred at a time when Miami-Dade County experienced slow population growth and accelerated domestic out-migration. South Miami-Dade's population increased by 7.3% (43,984 persons) since 2017, compared to 1.3% for Miami-Dade County. The abundance of South Miami-Dade's population growth since 2017 occurred in Census Designated Places (unincorporated communities). A CDP is a statistical entity comprising a densely settled concentration of population that is not within an incorporated place. In South Miami-Dade, there are 14 CDPs. CDPs such as Princeton and Naranja grew by 51.1% and 46.6%, respectively, indicating that CDPs have become the leading population growth centers in South Miami-Dade. Only Homestead (22.9%) experienced a significant population increase among municipalities.

The growth of South Miami-Dade's labor force is reflective of the region's overall population increase. South Miami-Dade's labor force increased by 13.2% (35,961 workers) during this period. The largest labor force increases occurred in the City of Homestead (36.4%), and the Naranja (78.2%), Princeton (72.4%), Goulds (56.8%), and Country Walk (31.0%) CDPs. In total, South Miami-Dade's labor force grew by 13.2% since 2017, compared to 8.4% in Miami-Dade County. South Miami-Dade's current 307,637 labor force now represents 22.7% of Miami-Dade County's total labor force.

Communities in South Miami-Dade with the highest levels of population growth since 2017 also had the most significant increases among their prime-age worker populations (25-54). Among the municipalities, Homestead had the largest increase (6,858) in their prime-age worker population, while Princeton (7,158) and Naranja (2,742) had the largest increases among CDPs.

Significantly, South Miami-Dade had a decrease in its overall populations in the 18-24 and 25-34 age groups which also occurred in Miami-Dade County. This has become a growing concern in Miami-Dade County and South Florida. The decline in younger population age groups is attributed to escalating affordability issues in South Florida.

Worker Spatial Mismatch

The *2020 Strategic Economic Development Plan for South Dade* noted the low ratio of South Miami-Dade jobs to population and the increasing number of resident workers who leave South Miami-Dade every day to travel to work. This job gap and worker commute trend began during the peak of housing bubble in early 2006. In a policy brief, *Driving on Empty: The Hidden Costs Associated with Drive 'till You Qualify*, the FIU Metropolitan Center found Miami-Dade workers further distancing themselves from their places of employment in search of more affordable housing opportunities. The Competitive Assessment found that the job gap and worker spatial mismatch has worsened over the past seven years. The current Employment Inflow/Outflow Analysis found that of the 277,498 employed residents who live in South Miami-Dade,

only 80,140 of the resident labor force, or 28.87 percent, work in South Miami-Dade. The Competitive Assessment found that while South Miami-Dade's large worker population has been a driver of economic growth in the county, South Miami-Dade has not generated a commensurate number of jobs to support its resident base. A benchmark analysis of industry job growth targeted in the 2020 plan found South Miami-Dade fell short in most industry categories including Health Care and Professional, Scientific, and Technical Services, Transportation and Warehousing (Logistics), and Manufacturing.

The Dynamics of South Miami-Dade's Economy

South Miami-Dade has a grouping of businesses that trade and grow within the network of businesses in the larger Miami-Dade County economy. According to Quarterly Census of Employment and Wages (QCEW) data, there are currently 14,761 employer establishments in South Miami-Dade that employ 152,039 workers. South Miami-Dade's leading industry sectors include Health Care (2,436 establishments), Professional, Scientific, and Technical Services (2,133 establishments), and Construction (1,542 establishments). South Miami-Dade's economic base is primarily comprised (91%) of small business establishments under 20 employees. The South Florida economy is noted for its especially high concentration and high rate of formation of small businesses relative to the national economy. Of note, however, the 234 businesses in South Miami-Dade with 100+ employees generate 62,612 jobs. South Miami-Dade's leading employment sectors include:

- Retail – 28,874 workers
- Health Care – 27,900 workers
- Accommodation and Food Services – 15,194 workers
- Construction – 11,348 workers

Miami-Dade County has a growing presence of business establishments and employees in the advanced industries sector. There is a smaller share of advanced industry employment in South Miami-Dade, though it is representative of the county. There are 1,214 advanced industry establishments in South Miami-Dade that employ 6,588 workers. The three leading advanced industry sectors in South Miami-Dade are Management, Scientific, and Technical Consulting Services (528 establishments), Architectural, Engineering (243 establishments), and Computer Systems Design and Related Services (230 establishments).

Miami-Dade's Growing Aerospace Industry

Advanced manufacturing is the use of innovative technologies to create existing products and the creation of new products. Advanced manufacturing can include production activities that depend on information, automation, computation, software, sensing, and networking. Advanced manufacturing has also been applied to traditional manufacturing like steel and automotive. Miami-Dade County's fastest growing advanced manufacturing sector is NAICS 336412: Aerospace Product and Parts. Miami-Dade's Aerospace Manufacturing industry has shown significant (161%) job growth since 2017. There are currently 94 aerospace manufacturing establishments in Miami-Dade County employing 2,884 workers.

Aerospace Product and Parts Manufacturing is one of 35 manufacturing industries outlined in the North American Industry Classification System (NAICS) that qualify as advanced. Miami-Dade County's aerospace industry is concentrated in three national industry classifications, NAICS 336412 - Aircraft

Engine and Engine Parts Manufacturing, NAICS 33613 -Other Aircraft Parts and Auxiliary Equipment Manufacturing, and NAICS 33611 - Aircraft Manufacturing.

Effective July 1, 2024, Homestead Air Reserve Base (HARB) and Miami-Dade County land north of HARB were designated as official Florida Spaceport Territories to foster aerospace research, manufacturing, and development. A Spaceport Territory is an aerospace hub that creates an ecosystem for companies to be centralized in one area with access to resources, shared ideas, a talented workforce, premium locations, and capital. Spaceport Territory designation provides economic incentives for aerospace companies to locate in South Miami-Dade.

Designation of the Spaceport Territory builds on the work of the South Dade Aerospace Technology Zone (SDAZ) Consortium. The SDAZ is comprised of the Economic Development Council of South Miami-Dade (EDC), South Florida Defense Alliance, and Florida International University's Jorge M. Pérez Metropolitan Center (JPMC).

I INTRODUCTION

A. Overview

The *2026 Competitive Assessment of South Miami-Dade County* is the first of two documents that will provide an update to the Economic Development Council (EDC) of South Miami Dade's *2020 Strategic Economic Development Plan for South-Dade.* As highlighted in the 2020 plan, the sheer economic, demographic, and cultural diversity of South Miami-Dade creates unique challenges in the development of a unified economic development plan. Nonetheless, there is consensus that this diversity is also a key strength of the region which can be leveraged. While Hurricane Andrew devastated and completely reconfigured South Miami-Dade's physical landscape and halted economic activity in 1992, South Miami-Dade's prime working-age population has grown substantially over the past two decades and is now poised to become Miami-Dade County's core region for economic growth in the decades to come.

South Miami-Dade County today is experiencing a renewed economic vibrancy where traditional industries such as agriculture, healthcare, and trade thrive along with the emergence of a growing manufacturing sector and other key advanced industries. Space Florida's designation of the Homestead Spaceport Territories in 2024 will support aerospace commerce, innovation and investment that should propel South Miami-Dade's economy and potentially transform the industry mix of the region. However, to capitalize on these opportunities, it is imperative for local government officials, business leaders, and institutions to be equipped with the most accurate, up-to-date socioeconomic data to effectively gauge the economic state of South Miami-Dade and enable sound policy decision-making going forward. The emergence of the Economic Development Council of South Miami-Dade, Inc. (EDC) shortly after Hurricane Andrew is a testimony to resilient forces at play. Now, it is time for all those engaged in the 2020 planning process and newcomers to the region to craft an updated economic development strategic plan that will guide the growth of South Miami-Dade's economy in the coming years.

B. Competitive Assessment Process

The Competitive Assessment of South Miami-Dade provides the underpinnings for strategic planning discussions and decision-making throughout the project and ultimately will serve as the analytical platform for the EDC's *2026 Economic Development Strategic Plan.* The objective is to identify the potential economic drivers, policies and strategies that will attract private investment and enable business growth, job creation, increased tax revenues, and expanded economic opportunities for businesses and residents of South Miami-Dade County. The Competitive Assessment identifies the economic advantages and challenges of South Miami-Dade's major industries and assets including the recently designated Homestead Spaceport Territory and the advanced and targeted industries in the larger trade area that could help drive economic development investment in the future. The Competitive Assessment also relies on a robust community engagement process to gain input and guidance from community and business leaders.

C. Elements of Economic Competitiveness

The future competitiveness and economic resilience of South Miami-Dade will be largely dependent on the enhancement and growth of existing and newly established traded industry sectors. Traded industries not only bring new money into the region, but they are also the sectors that generate innovation, talent, and infrastructure investment. Traded industries are found in the advanced industry sector and often exist in industry clusters.

According to the Brookings Institution, the advanced industry sector is a cluster of important industries that concentrate in and drive many of the nation's best performing regional economies. The sector is composed of 50 industries identified at the 4-digit NAICS level, and includes manufacturing, chemicals, pharmaceuticals, advanced metals, industrial machinery, medical equipment manufacture, energy development and distribution, software design, data processing, and medical and diagnostic labs. Significantly, the advanced industry sector led the nation's economic revitalization in the post-Great Recession. The advanced industry sector builds on a region's economic strengths and provides high-skill, high-paying employment less vulnerable in economic downturns.

Smart and successful regional economies engage in continuous strategic planning to remain competitive. All communities, large and small, compete for jobs, residents, and development in an environment that never stands still. Constantly changing demographics, household structure, technologies, and economic conditions require continual monitoring and updates. The economic impacts of the COVID-19 pandemic and Great Recession provide clear evidence of this reality. The fundamentals of economic resilience and competitiveness need to be built into the subsequent economic development strategic plan and include the following guiding principles:

- *Planning for Resilient and Sustainable Long-Term Growth*: Large swings in business and housing market cycles can be especially damaging at the local level. Competitive communities support diversified employment, industry, and occupational growth that is less susceptible to business cycle fluctuations, protecting small businesses, worker incomes, and household wealth during national economic downturns;

- *Supporting Local Innovation:* All local economies grow through the expansion of local businesses and a steady supply of new businesses to maintain employment and competitive advantages. All businesses, even small ones, engage in markets that never stand still, and need to continuously innovate, invest, and update to remain competitive. Successful communities support local business capacity to innovate and adopt new technologies to improve performance;

- *Expanding Economic Opportunity and Upward Mobility*: Economically resilient communities support an expanding supply of jobs and occupations paying competitive wages and skills that provide a platform for upward economic mobility to build household wealth. In addition, competitive regions and communities implement strategies to prepare residents to compete for these opportunities;

- *Building Local Human Capital:* Resilient local economies build and improve the collective knowledge and skills of its labor force, building a local labor force with the skills, education and brainpower to support globally competitive businesses, obtain higher-wages, high-skilled employment opportunities, and adapt to rapidly changing employment markets, technology, and industry changes;

- *Targeted and Strategic Allocation of Resources to Stimulate Economic Growth:* In an era of shrinking federal and state funding, leaders in high performing regional and local economies must a) focus and target investments in their local strengths, b) take a disciplined and targeted approach to investments in physical assets, real estate, and infrastructure, and c) focus on high-

wage job creation in leading local industries before attempting to create jobs in entirely new industries;

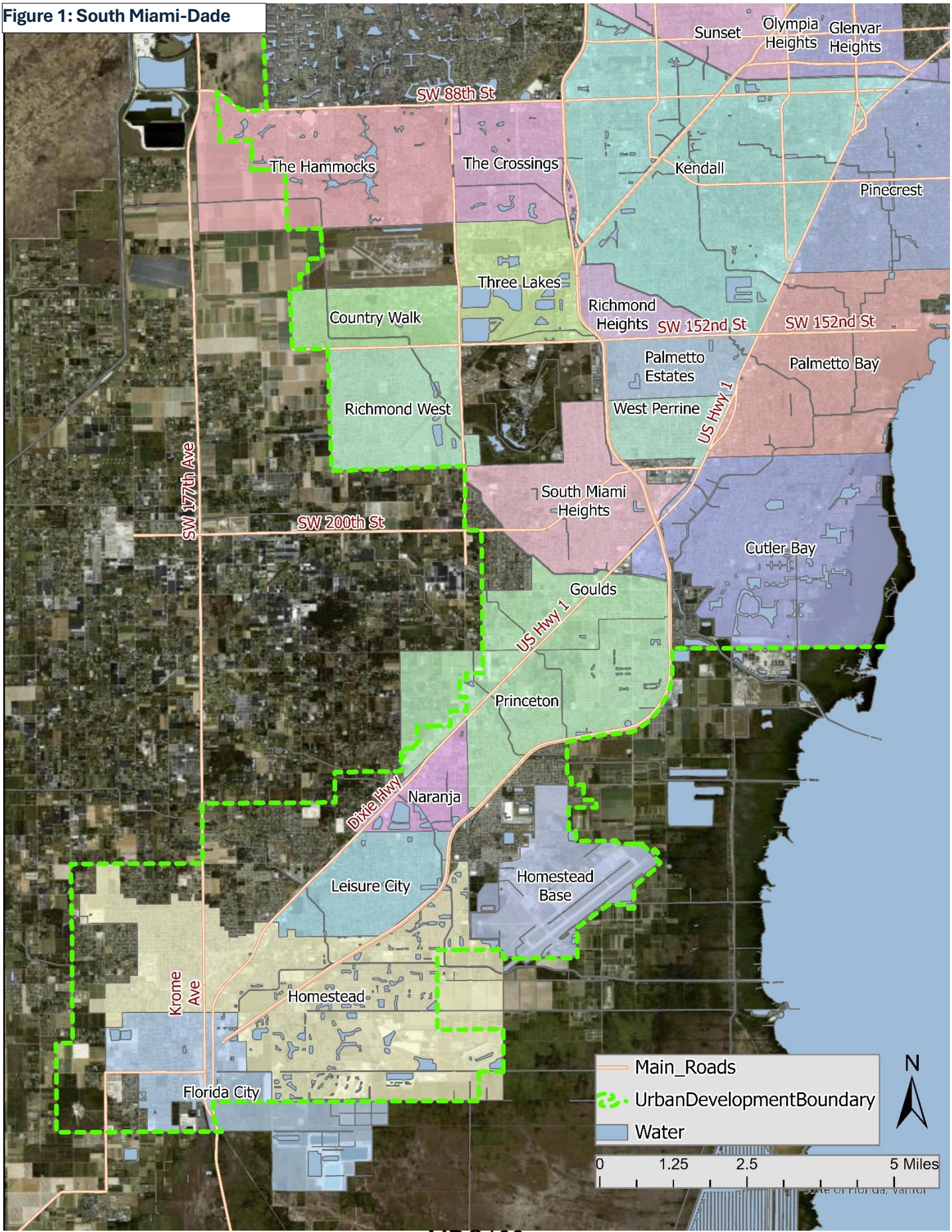
- *Strategic Quality of Life Investments:* Resilient communities make intelligent investments in quality public spaces, multi-generational recreation, and activities that further enhance the work-life balance.

D. Final Report: South Miami-Dade County Economic Development Strategic Plan

The Competitive Assessment provides the economic development planning analytics for the Economic Development Council (EDC) of South Miami-Dade's *2026 Economic Development Strategic Plan*. The strategic plan will consist of the following key elements:

- A statement of goals, objectives and strategic priorities;
- Clear statements on South Miami-Dade's economic development potential, competitive advantages, opportunities and direction for immediate and long-term growth;
- Business strategies for the region's most promising industries, occupations and new small business creation opportunities;
- A clear description of the specific needs of target businesses and industries to help guide South Miami-Dade's direction of resources, projects, programs, and incentives; and
- An economic development management element with performance metrics and marketing strategies.

Figure 1: South Miami-Dade



II ECONOMIC & DEMOGRAPHIC TRENDS

A. Population Growth

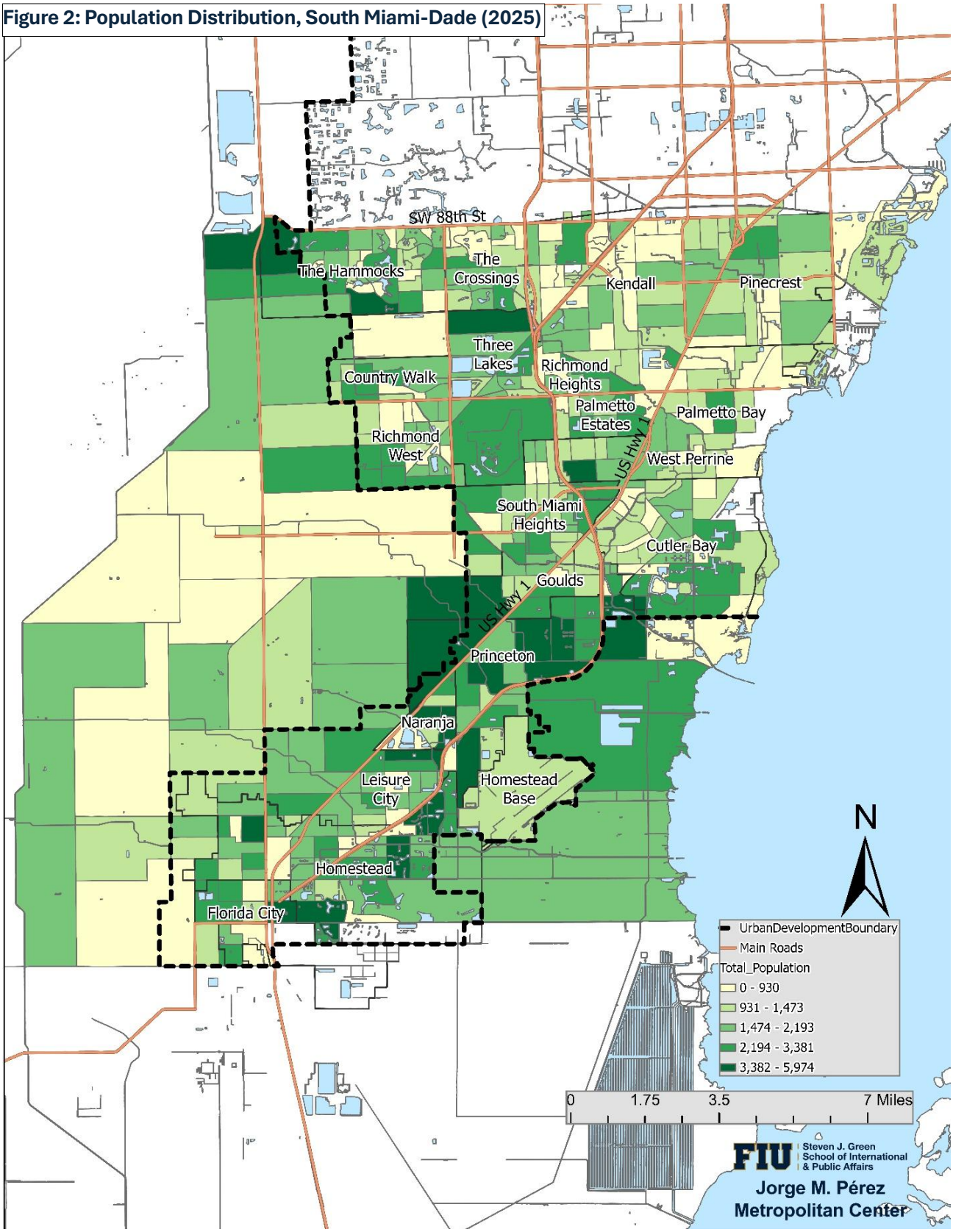
Trends in population growth (or decline) are used as a general measure of economic performance. South Miami-Dade's population has grown from 603,342 in 2017 to 647,326 in 2024 (**Table 1**) - the most recent year for which U.S. Census ACS 5-Year Estimates are available- representing a 7.3% increase. In contrast, Miami-Dade County's population grew by 1.3% during the same period, pointing to a significant population growth rate in South Miami-Dade. Specifically, most of this population growth in South Miami-Dade occurred in the City of Homestead, with 22.9% growth, and several Census Designated Places (CDPs). A CDP is an unincorporated community identified by the U.S. Census Bureau for statistical purposes. The Census Bureau treats CDPs as the statistical equivalent of a city. This way, they can ensure these places appear in population counts and data for the target population. In South Miami-Dade, there are 14 CDPs. CDPs such as Princeton and Naranja grew by 51.1% and 46.6%, respectively, indicating that CDPs have become the leading population growth centers in South Miami-Dade County. In contrast, municipalities such as Palmetto Bay and Pinecrest and CDPs such as Richmond Heights, Richmond West, and South Miami Heights have experienced modest population declines. **Figure 2** illustrates the population distribution of South Miami-Dade.

Table 1: Population Change by Municipalities and CDPs in South Miami-Dade (2017- 2024)

	Population			Labor Force Population		
	2017	2024	% Change	2017	2024	% Change
Town of Cutler Bay	44,721	45,070	0.8%	22,195	22,441	1.1%
Florida City	12,149	12,943	6.5%	3,910	4,388	12.2%
City of Homestead	67,354	82,807	22.9%	27,723	37,804	36.4%
Village of Palmetto Bay	24,679	24,639	-0.2%	11,417	12,353	8.2%
Village of Pinecrest	19,441	18,462	-5.0%	9,179	8,455	-7.9%
Census Designated Places (Unincorporated)						
Country Walk CDP	16,601	19,291	16.2%	7,702	10,087	31.0%
Goulds CDP	11,768	14,425	22.6%	3,944	6,184	56.8%
Kendall CDP	75,123	79,562	5.9%	38,247	39,445	3.1%
Leisure City CDP	27,389	27,808	1.5%	10,417	11,756	12.9%
Naranja CDP	10,776	15,796	46.6%	3,879	6,914	78.2%
Palmetto Estates CDP	15,998	16,129	0.8%	7,484	7,510	0.3%
Princeton CDP	28,201	42,625	51.1%	12,140	20,930	72.4%
Richmond Heights CDP	11,155	9,992	-10.4%	5,070	4,876	-3.8%
Richmond West CDP	36,898	35,593	-3.5%	18,695	17,441	-6.7%
South Miami Heights CDP	39,312	38,766	-1.4%	17,709	18,145	2.5%
The Crossings CDP	23,062	22,963	-0.4%	11,409	12,090	6.0%
The Hammocks CDP	58,976	58,838	-0.2%	30,004	30,005	0.0%
Three Lakes CDP	16,266	16,888	3.8%	8,484	9,172	8.1%
West Perrine CDP	10,634	11,162	5.0%	4,040	4,864	20.4%
Municipalities and CDPs Total	**550,503**	**593,759**	**7.9%**	**253,648**	**284,860**	**12.3%**
South Miami-Dade	**603,342**	**647,326**	**7.3%**	**271,676**	**307,637**	**13.2%**
Miami-Dade County	**2,702,602**	**2,738,356**	**1.3%**	**1,251,193**	**1,356,445**	**8.4%**

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

Figure 2: Population Distribution, South Miami-Dade (2025)



Source: ACS 5 Year Estimates 2017, 2024 ; TIGER Shapefiles 2024

B. Labor Force

The primary purpose of labor market analysis is to provide insights into current and future workforce needs, helping businesses, organizations, and policymakers make informed decisions about industry employment, training, and economic development strategies. Labor force and employment data also provide important information on the size and stability of a local economy as measured by the local workforce. Trends developed from this data can help new and existing businesses understand the strengths, weaknesses, and predictability of the area economy. Labor force participation rates (LFPRs) measure the number of citizens employed or looking for employment as a percentage of the civilian non-institutional population. LFPR data can also help determine the factors that lead to discouraged workers, or workers that have dropped out of the labor force.

The growth in South Miami-Dade's labor force is reflective of larger population increases since 2017. The largest labor force increases occurred in the City of Homestead (36.4%), and the Naranja (78.2%), Princeton (72.4%), Goulds (56.8%), and Country Walk (31.0%) CDPs. In total, South Miami-Dade's labor force grew by 13.2% since 2017 compared to 8.4% in Miami-Dade County, as a whole. South Miami-Dade's current 307,637 labor force count now represents 22.7% of Miami-Dade County's total labor force.

C. Demographic Age Structure

Many factors can impact growth in the labor market and the LFPR, including economic and demographic trends. In fact, demographics can help explain the general decline in national LFPRs over the last two decades as the composition of the labor force has changed as a result of an aging workforce and a general increase in educational attainment. The labor force participation rate differs across age groups. Among all age groups, workers aged 25-54, also known as prime-age workers, have the highest labor force participation rate. They form the core of the U.S. labor force, accounting for nearly two-thirds of the total labor force.

In South Miami-Dade, communities with the highest levels of population growth since 2017 also had the most significant increases among their prime age worker populations. As **Table 2** shows, among the municipalities, Homestead had the largest increase (6,858) in their prime-age worker population, while Princeton (7,158) and Naranja (2,742) had the largest increases among CDPs.

Significantly, South Miami-Dade had a decrease in its overall populations in the 18-24 and 25-34 age groups which also occurred in Miami-Dade County, as a whole. The only municipality that increased both these younger population age groups was Homestead. The Village of Palmetto Bay had an increase in its 25-34 age group. Among the CDPs, Princeton, Naranja, and Country Walk had significant increases in the two younger age groups.

Table 2: Demographic Age Structure for South Miami-Dade (2017- 2024)

	2017 Age for South Miami-Dade Cities and CDPs						2024 Age for South Miami-Dade Cities and CDPs					
	Total population	Under 18 years	18 to 24 years	25 to 54 years	55 to 64 years	65 years and over	Total population	Under 18 years	18 to 24 years	25 to 54 years	55 to 64 years	65 years and over
Town of Cutler Bay	44,721	11,397	3,676	19,374	5,141	5,133	45,070	10,097	3,618	17,999	5,745	7,611
		25.5%	8.2%	43.3%	11.5%	11.5%		22.4%	8.0%	39.9%	12.7%	16.9%
Florida City	12,149	4,120	1,516	4,692	1,043	778	12,943	4,178	1,195	5,148	926	1,496
		33.9%	12.5%	38.6%	8.6%	6.4%		32.3%	9.2%	39.8%	7.2%	11.6%
City of Homestead	67,354	21,269	5,988	29,678	5,261	5,158	82,807	24,446	7,955	36,536	6,871	6,999
		31.6%	8.9%	44.1%	7.8%	7.7%		29.5%	9.6%	44.1%	8.3%	8.5%
Village of Palmetto Bay	24,679	6,322	2,198	9,371	3,195	3,593	24,639	5,984	1,524	9,406	3,917	3,808
		25.6%	8.9%	38.0%	12.9%	14.6%		24.3%	6.2%	38.2%	15.9%	15.5%
Village of Pinecrest	19,441	4,959	1,601	7,173	2,766	2,942	18,462	5,220	1,236	6,289	2,494	3,223
		25.5%	8.2%	36.9%	14.2%	15.1%		28.3%	6.7%	34.1%	13.5%	17.5%
Census Designated Places CDP (Unincorporated)												
Country Walk CDP	16,601	4,355	1,366	7,305	1,795	1,780	19,291	4,475	1,901	8,142	2,572	2,201
		26.2%	8.2%	44.0%	10.8%	10.7%		23.2%	9.9%	42.2%	13.3%	11.4%
Goulds CDP	11,768	3,729	1,148	4,667	1,160	1,064	14,425	3,514	1,137	5,741	1,718	2,315
		31.7%	9.8%	39.7%	9.9%	9.0%		24.4%	7.9%	39.8%	11.9%	16.0%
Homestead Base CDP	843	343	150	261	54	35	1,125	494	152	377	61	41
		40.7%	17.8%	31.0%	6.4%	4.2%		43.9%	13.5%	33.5%	5.4%	3.6%
Kendall CDP	75,123	14,129	6,111	30,812	10,621	13,450	79,562	16,797	5,161	30,124	11,070	16,410
		18.8%	8.1%	41.0%	14.1%	17.9%		21.1%	6.5%	37.9%	13.9%	20.6%
Leisure City CDP	27,389	7,531	3,024	11,713	2,535	2,586	27,808	8,128	2,898	11,253	2,802	2,727
		27.5%	11.0%	42.8%	9.3%	9.4%		29.2%	10.4%	40.5%	10.1%	9.8%
Naranja CDP	10,776	3,631	1,019	4,274	998	854	15,796	4,642	1,327	7,016	1,603	1,208
		33.7%	9.5%	39.7%	9.3%	7.9%		29.4%	8.4%	44.4%	10.1%	7.6%
	15,998	3,593	1,835	6,672	1,839	2,059	16,129	3,149	1,497	6,814	1,875	2,794

MDC1407

2017 Age for South Miami-Dade Cities and CDPs							2024 Age for South Miami-Dade Cities and CDPs					
	Total population	Under 18 years	18 to 24 years	25 to 54 years	55 to 64 years	65 years and over	Total population	Under 18 years	18 to 24 years	25 to 54 years	55 to 64 years	65 years and over
Palmetto Estates CDP		22.5%	11.5%	41.7%	11.5%	12.9%		19.5%	9.3%	42.2%	11.6%	17.3%
	28,201	8,376	2,744	12,634	2,421	2,026	42,625	12,111	3,223	19,792	3,826	3,673
Princeton CDP		29.7%	9.7%	44.8%	8.6%	7.2%		28.4%	7.6%	46.4%	9.0%	8.6%
Richmond Heights CDP	11,155	2,207	996	5,243	1,091	1,618	9,992	2,174	773	4,187	1,024	1,834
		19.8%	8.9%	47.0%	9.8%	14.5%		21.8%	7.7%	41.9%	10.2%	18.4%
Richmond West CDP	36,898	8,228	3,688	16,295	4,088	4,599	35,593	7,724	2,616	13,876	4,663	6,714
		22.3%	10.0%	44.2%	11.1%	12.5%		21.7%	7.3%	39.0%	13.1%	18.9%
South Miami Heights CDP	39,312	8,732	4,012	16,371	4,795	5,402	38,766	7,895	2,921	15,333	5,782	6,835
		22.2%	10.2%	41.6%	12.2%	13.7%		20.4%	7.5%	39.6%	14.9%	17.6%
The Crossings CDP	23,062	4,640	2,015	9,070	3,571	3,766	22,963	4,511	1,702	9,086	3,021	4,643
		20.1%	8.7%	39.3%	15.5%	16.3%		19.6%	7.4%	39.6%	13.2%	20.2%
The Hammocks CDP	58,976	11,717	6,533	26,593	7,068	7,065	58,838	12,162	4,277	23,976	8,235	10,188
		19.9%	11.1%	45.1%	12.0%	12.0%		20.7%	7.3%	40.7%	14.0%	17.3%
	16,266	3,872	1,539	7,590	1,760	1,505	16,888	3,954	1,535	7,466	2,115	1,818
Three Lakes CDP		23.8%	9.5%	46.7%	10.8%	9.3%		23.4%	9.1%	44.2%	12.5%	10.8%
West Perrine CDP	10,634	3,026	952	4,089	1,290	1,277	11,162	2,855	872	4,864	1,137	1,434
		28.5%	9.0%	38.5%	12.1%	12.0%		25.6%	7.8%	43.6%	10.2%	12.8%
South Miami-Dade	**603,342**	**150,014**	**57,486**	**256,200**	**67,763**	**71,879**	**647,326**	**157,230**	**53,890**	**265,728**	**77,211**	**93,267**
		24.9%	**9.5%**	**42.5%**	**11.2%**	**11.9%**		**24.3%**	**8.3%**	**41.1%**	**11.9%**	**14.4%**
Miami-Dade County	**2,702,602**	**553,299**	**243,004**	**1,171,391**	**320,586**	**414,322**	**2,738,356**	**548,079**	**225,477**	**1,139,011**	**361,893**	**463,896**
		20.5%	**9.0%**	**43.3%**	**11.9%**	**15.3%**		**20.0%**	**8.2%**	**41.6%**	**13.2%**	**16.9%**

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

MDC1408

D. Race and Ethnicity

The Hispanic or Latino population of South Miami-Dade has grown significantly since 2017. South Miami-Dade's Hispanic or Latinos now comprise 62.2% (445,274 persons) of the population compared to 56.9% (381,756 persons) in 2017 (**Table 3**). The percentage of South Miami-Dade's Hispanic or Latino population is now comparable (69.3%) to Miami-Dade County, as a whole.

Significantly, South Miami-Dade's White not Hispanic or Latino and Black or African American populations have decreased since 2017 which aligns with Miami-Dade County's demographic trend, as a whole. South Miami-Dade's White not Hispanic or Latino and Black or African American populations decreased by 16.4% and 9.6%, respectively, since 2017.

Table 3: Race and Ethnicity South Miami-Dade (2017- 2024)

	Total Population	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race	Total Population	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race
	2017				**2024**				**% Change 2017-2024**		
Cutler Bay Town	44,721	12,281	4,711	25,909	45,070	9,634	3,957	28,844	-21.6%	-16.0%	11.3%
		27.5%	10.5%	57.9%		21.4%	8.8%	64.0%			
Florida City	12,149	480	5,418	6,179	12,943	517	5,030	7,287	7.7%	-7.2%	17.9%
		4.0%	44.6%	50.9%		4.0%	38.9%	56.3%			
Homestead City	67,354	8,992	14,107	42,563	82,807	8,847	15,208	55,837	-1.6%	7.8%	31.2%
		13.4%	20.9%	63.2%		10.7%	18.4%	67.4%			
Palmetto Bay Village	24,679	10,634	1,368	10,805	24,639	8,945	1,059	12,594	-15.9%	-22.6%	16.6%
		43.1%	5.5%	43.8%		36.3%	4.3%	51.1%			
Pinecrest Village	19,441	8,419	119	9,113	18,462	7,481	338	8,989	-11.1%	184.0%	-1.4%
		43.3%	0.6%	46.9%		40.5%	1.8%	48.7%			
Census Designated Places (Unincorporated)											
Country Walk CDP	16,601	3,288	1,121	11,326	19,291	2,149	1,322	14,542	-34.6%	17.9%	28.4%
		19.8%	6.8%	68.2%		11.1%	6.9%	75.4%			
Goulds CDP	11,768	669	5,413	5,366	14,425	1,233	5,772	7,164	84.3%	6.6%	33.5%
		5.7%	46.0%	45.6%		8.5%	40.0%	49.7%			
Homestead Base CDP	843	131	443	260	1,125	78	624	422	-40.5%	40.9%	62.3%
		15.5%	52.6%	30.8%		6.9%	55.5%	37.5%			

	Total Population	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race	Total Population	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race
	2017				**2024**				**% Change 2017-2024**		
Kendall CDP	75,123	18,735	2,437	50,242	79,562	18,363	2,465	53,609	-2.0%	1.1%	6.7%
		24.9%	3.2%	66.9%		23.1%	3.1%	67.4%			
Leisure City CDP	27,389	874	3,869	22,209	27,808	1,204	3,494	22,743	37.8%	-9.7%	2.4%
		3.2%	14.1%	81.1%		4.3%	12.6%	81.8%			
Naranja CDP	10,776	501	3,800	6,058	15,796	1,288	3,594	10,702	157.1%	-5.4%	76.7%
		4.6%	35.3%	56.2%		8.2%	22.8%	67.8%			
Palmetto Estates CDP	15,998	1,410	5,415	8,088	16,129	938	5,202	9,340	-33.5%	-3.9%	15.5%
		8.8%	33.8%	50.6%		5.8%	32.3%	57.9%			
Princeton CDP	28,201	3,015	5,900	18,602	42,625	3,897	6,310	31,038	29.3%	6.9%	66.9%
		10.7%	20.9%	66.0%		9.1%	14.8%	72.8%			
Richmond Heights CDP	11,155	571	6,932	3,494	9,992	382	3,597	5,645	-33.1%	-48.1%	61.6%
		5.1%	62.1%	31.3%		3.8%	36.0%	56.5%			
Richmond West CDP	36,898	5,341	2,283	27,837	35,593	2,757	2,183	28,851	-48.4%	-4.4%	3.6%
		14.5%	6.2%	75.4%		7.7%	6.1%	81.1%			
South Miami Heights CDP	39,312	3,393	6,756	28,240	38,766	1,652	6,311	29,272	-51.3%	-6.6%	3.7%
		8.6%	17.2%	71.8%		4.3%	16.3%	75.5%			
The Crossings CDP	23,062	5,982	860	15,173	22,963	5,041	470	16,464	-15.7%	-45.3%	8.5%
		25.9%	3.7%	65.8%		22.0%	2.0%	71.7%			
The Hammocks CDP	58,976	8,199	1,779	46,540	58,838	6,942	2,415	46,699	-15.3%	35.8%	0.3%
		13.9%	3.0%	78.9%		11.8%	4.1%	79.4%			
Three Lakes CDP	16,266	3,808	1,596	10,033	16,888	3,213	940	10,682	-15.6%	-41.1%	6.5%
		23.4%	9.8%	61.7%		19.0%	5.6%	63.3%			
West Perrine CDP	10,634	951	5,785	3,640	11,162	312	4,174	6,348	-67.2%	-27.8%	74.4%
		8.9%	54.4%	34.2%		2.8%	37.4%	56.9%			
South Miami-Dade	**603,342**	**109,767**	**88,898**	**381,756**	**647,326**	**91,781**	**80,356**	**445,274**	-16.4%	-9.6%	16.6%
		18.2%	**14.7%**	**63.3%**		**14.2%**	**12.4%**	**68.8%**			
Miami-Dade County	**2,702,602**	**371,233**	**441,604**	**1,823,038**	**2,738,356**	**344,354**	**384,902**	**1,898,211**	-7.2%	-12.8%	4.1%
		13.7%	**16.3%**	**67.5%**		**12.6%**	**14.1%**	**69.3%**			

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

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E. Educational Attainment

Educational attainment is an important economic development indicator. Educational attainment can raise an individual's productivity and creativity and promote entrepreneurship and technological advances. A local economy's ability to stay competitive depends on the flexibility of the labor force to adapt to changes in job opportunities and investing in the education and training necessary to meet new demands. In fact, the most important economic development factor in the knowledge economy and its current focus on innovation is the quality and availability of the workforce. Educational achievement and attainment are important aspects of labor force quality.

South Miami-Dade's educational attainment has improved significantly. According to the U.S. Census, American Community Survey, South Miami-Dade's population 25 years and older with a bachelor's degree or higher increased by 23.1% since 2017. Notably, the population 25 years and older with a high school diploma has increased by 12.7% (**Table 4**).

All five municipalities and most CDPs have seen an increase in the percentage of their population 25 years and over with a bachelor's degree or higher. Among the municipalities, the largest increases were in Florida City (126.9%) and Homestead (51.5%). Among the CDPs, the highest increases were in Naranja (115.3%), Princeton (105.8%), and Goulds (48.4%).

Table 4: Educational Attainment by Municipalities and CDPs in South Miami-Dade (2017- 2024)

	2017			2024			% Change 2017-2024	
	Population 25 years and over	High school graduate or higher	Bachelor's degree or higher	Population 25 years and over	High school graduate or higher	Bachelor's degree or higher	High school graduate or higher	Bachelor's degree or higher
Town of Cutler Bay	29,648	26,416	9,398	31,355	27,540	10,660	4.3%	13.4%
		89.10%	31.70%		87.80%	34.00%		
Florida City	6,513	3,263	378	7,570	5,421	857	66.1%	126.9%
		50.10%	5.80%		71.60%	11.30%		
City of Homestead	40,097	29,592	8,300	50,406	38,793	12,575	31.1%	51.5%
		73.80%	20.70%		77.00%	24.90%		
Village of Palmetto Bay	16,159	15,319	8,694	17,131	15,921	10,300	3.9%	18.5%
		94.80%	53.80%		92.90%	60.10%		
Village of Pinecrest	12,881	12,288	7,935	12,006	11,791	8,693	-4.0%	9.6%
		95.40%	61.60%		98.20%	72.40%		
Census Designated Places CDP (Unincorporated)								
Country Walk CDP	10,880	10,031	3,438	12,915	12,080	4,754	20.4%	38.3%
		92.20%	31.60%		93.50%	36.80%		
Goulds CDP	6,891	5,478	1,006	9,774	7,665	1,493	39.9%	48.4%
		79.50%	14.60%		78.40%	15.30%		
Homestead Base CDP	350	237	-	479	289	57	22.0%	--
		67.70%	0.00%		60.30%	11.90%		
Kendall CDP	54,883	50,437	24,588	57,604	53,853	27,570	6.8%	12.1%
		91.90%	44.80%		93.50%	47.90%		

	2017			2024			% Change 2017-2024	
	Population 25 years and over	High school graduate or higher	Bachelor's degree or higher	Population 25 years and over	High school graduate or higher	Bachelor's degree or higher	High school graduate or higher	Bachelor's degree or higher
Leisure City CDP	16,834	10,437	1,734	16,782	11,045	1,705	5.8%	-1.7%
		62.00%	10.30%		65.80%	10.20%		
Naranja CDP	6,126	4,527	925	9,827	7,695	1,992	70.0%	115.3%
		73.90%	15.10%		78.30%	20.30%		
Palmetto Estates CDP	10,570	8,646	1,977	11,483	9,607	2,886	11.1%	46.0%
		81.80%	18.70%		83.70%	25.10%		
Princeton CDP	17,081	13,733	3,707	27,291	23,861	7,629	73.7%	105.8%
		80.40%	21.70%		87.40%	28.00%		
Richmond Heights CDP	7,952	6,823	1,328	7,045	5,969	1,688	-12.5%	27.1%
		85.80%	16.70%		84.70%	24.00%		
Richmond West CDP	24,982	21,410	6,995	25,253	22,206	8,324	3.7%	19.0%
		85.70%	28.00%		87.90%	33.00%		
South Miami Heights CDP	26,568	19,793	4,331	27,950	22,795	5,467	15.2%	26.2%
		74.50%	16.30%		81.60%	19.60%		
The Crossings CDP	16,407	15,308	5,808	16,750	15,661	7,154	2.3%	23.2%
		93.30%	35.40%		93.50%	42.70%		
The Hammocks CDP	40,726	36,938	13,440	42,399	37,987	16,061	2.8%	19.5%
		90.70%	33.00%		89.60%	37.90%		
Three Lakes CDP	10,855	9,943	4,223	11,399	10,382	4,364	4.4%	3.3%
		91.60%	38.90%		91.10%	38.30%		
West Perrine CDP	6,656	5,425	1,278	7,435	6,457	1,554	19.0%	21.6%
		81.50%	19.20%		86.80%	20.90%		
South Miami-Dade	**395,842**	**329,728**	**114,628**	**436,206**	**371,732**	**141,052**	**12.7%**	**23.1%**
		83.3%	**29.0%**		**85.2%**	**32.3%**		
Miami-Dade County	**1,906,299**	**1,543,966**	**530,196**	**1,964,800**	**1,649,424**	**675,665**	**6.8%**	**27.4%**
		81.0%	**34.3%**		**83.9%**	**34.4%**		

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

F. Household Income

According to the 2024 ACS, the median household income in South Miami-Dade is $83,281 compared to $71,753 for Miami-Dade County, as a whole (**Table 5**). Median household incomes vary significantly in South Miami-Dade ranging from a low of $47,482 in Florida City to $206,417 in Village of Pinecrest. Among the CDPs, median household incomes range from a low of $41,977 in Leisure City to a high of $124,540 in Country Walk.

Among the municipalities, Homestead had the highest percentage increase (51.6%) in its median household income since 2017. Several CDPs had significant increase in their median household incomes including Goulds (79.8%), Naranja (66.5%), Princeton (65.3%), West Perrine (65.3%), Country Walk (64.8%), and South Miami Heights (64.3%).

Table 5: Household income by Municipalities and CDPs in South Miami-Dade (2017- 2024)

	Median Household Income		
	2017	**2024**	**% Change**
Town of Cutler Bay	$70,473	$89,244	26.6%
Florida City	$34,545	$47,482	37.4%
City of Homestead	$43,150	$65,423	51.6%
Village of Palmetto Bay	$107,612	$142,447	32.4%
Village of Pinecrest	$152,643	$206,417	35.2%
Census Designated Places (Unincorporated)			
Country Walk CDP	$75,550	$124,540	64.8%
Goulds CDP	$34,344	$61,735	79.8%
Homestead Base CDP	$11,824	$7,969	-32.6%
Kendall CDP	$69,277	$87,325	26.1%
Leisure City CDP	$32,770	$41,977	28.1%
Naranja CDP	$32,432	$53,984	66.5%
Palmetto Estates CDP	$54,390	$82,064	50.9%
Princeton CDP	$50,483	$83,426	65.3%
Richmond Heights CDP	$47,223	$67,606	43.2%
Richmond West CDP	$74,284	$101,970	37.3%
South Miami Heights CDP	$39,825	$65,417	64.3%
The Crossings CDP	$68,824	$91,012	32.2%
The Hammocks CDP	$65,211	$85,628	31.3%
Three Lakes CDP	$65,000	$102,306	57.4%
West Perrine CDP	$40,528	$66,997	65.3%
South Miami-Dade	**$60,865**	**$83,281**	**36.8%**
Miami-Dade County	**$46,338**	**$71,753**	**54.8%**

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates; *Median Household Income for South Miami-Dade is computed using a weighted median income approach*

G. Occupations and Wages

As previously noted, South Miami-Dade's population age 16 and over in the labor force increased by 13.2% since 2017. A current analysis by occupational codes found significant employment changes since 2017. Occupational codes are standardized numerical labels used to categorize and organize jobs according to their responsibilities, required skills, education, and training. Systems such as the Standard Occupational Classification (SOC) assign these codes, allowing federal agencies to consistently collect and analyze labor market data across different industries and regions.

As shown in **Table 6**, in South Miami-Dade County, the most significant growth occurred among several SOCs including management (70%), legal (49%), and business and financial occupations (43%). Notably, there was growth in most occupation codes and specifically those with the highest median hourly and annual earnings.

Table 6: Jobs and Wages by Occupation, South Miami-Dade (2017-2025)

SOC	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Median Hourly Earnings	Median Annual Earnings	COL Adjusted Median Hourly Earnings	COL Adjusted Median Annual Earnings
11-0000	Management Occupations	12,970	22,090	9,121	70%	$44.14	$91,805.78	$40.23	$83,688.04
13-0000	Business and Financial Operations Occupations	11,292	16,101	4,809	43%	$38.32	$79,714.26	$34.94	$72,665.69
15-0000	Computer and Mathematical Occupations	3,226	4,391	1,165	36%	$48.48	$100,838.64	$44.19	$91,922.19
17-0000	Architecture and Engineering Occupations	2,203	2,300	97	4%	$39.42	$81,988.12	$35.93	$74,738.49
19-0000	Life, Physical, and Social Science Occupations	1,520	1,929	410	27%	$36.68	$76,293.60	$33.44	$69,547.50
21-0000	Community and Social Service Occupations	3,760	4,641	881	23%	$27.07	$56,311.91	$24.68	$51,332.64
23-0000	Legal Occupations	3,426	5,105	1,680	49%	$47.56	$98,934.98	$43.36	$90,186.86
25-0000	Educational Instruction and Library Occupations	11,172	11,785	613	5%	$24.04	$50,004.23	$21.91	$45,582.71
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	3,429	4,385	956	28%	$26.61	$55,347.02	$24.26	$50,453.07
29-0000	Healthcare Practitioners and Technical Occupations	13,815	17,233	3,418	25%	$40.52	$84,288.74	$36.94	$76,835.67
31-0000	Healthcare Support Occupations	8,968	10,989	2,020	23%	$17.08	$35,527.65	$15.57	$32,386.19
33-0000	Protective Service Occupations	11,041	10,149	(892)	(8%)	$29.58	$61,536.59	$26.97	$56,095.35
35-0000	Food Preparation and Serving Related Occupations	15,601	17,538	1,937	12%	$16.49	$34,296.58	$15.03	$31,263.98
37-0000	Building and Grounds Cleaning and Maintenance Occupations	12,713	12,836	123	1%	$15.77	$32,806.81	$14.38	$29,905.94
39-0000	Personal Care and Service Occupations	8,600	8,494	(106)	(1%)	$15.33	$31,887.84	$13.98	$29,068.22
41-0000	Sales and Related Occupations	24,381	26,105	1,724	7%	$18.89	$39,300.70	$17.22	$35,825.61
43-0000	Office and Administrative Support Occupations	29,613	28,832	(782)	(3%)	$21.08	$43,847.18	$19.22	$39,970.08

SOC	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Median Hourly Earnings	Median Annual Earnings	COL Adjusted Median Hourly Earnings	COL Adjusted Median Annual Earnings
45-0000	Farming, Fishing, and Forestry Occupations	5,753	6,018	265	5%	$13.89	$28,901.59	$12.67	$26,346.03
47-0000	Construction and Extraction Occupations	14,244	16,812	2,568	18%	$22.59	$46,992.85	$20.59	$42,837.60
49-0000	Installation, Maintenance, and Repair Occupations	9,303	10,763	1,460	16%	$24.33	$50,613.47	$22.18	$46,138.07
51-0000	Production Occupations	6,139	5,986	(153)	(2%)	$18.74	$38,976.31	$17.08	$35,529.91
53-0000	Transportation and Material Moving Occupations	13,536	15,711	2,175	16%	$18.19	$37,830.55	$16.58	$34,485.46
55-0000	Military-only occupations	1,019	985	(34)	(3%)	$27.51	$57,218.22	$25.08	$52,158.81
99-0000	Unclassified Occupation	0	0	0	0%	$0.00	$0.00	$0.00	$0.00
		227,723	**261,178**	**33,456**	**15%**				

Source: LightCast 2017, 2025

H. Travel and Commute Patterns

The time and cost of traffic congestion, including increased commute times and lost productivity due to travel delays are tangible economic concerns for today's employers and workers alike. Travel and commute times play an increasingly important role in business location and employment decisions. According to 2024 ACS estimates, most workers in South Miami-Dade are employed in Miami-Dade County. However, average commute times exceed 35 minutes one way which means most workers commute beyond South Miami-Dade to their places of work.

U.S. Census data shows most regional commute times remain below where they were the year before the COVID-19 pandemic. Remote work and flexible hours have contributed to peak traffic times being more spread out. However, in South Miami-Dade, commute times of over one hour have become more common due to rapid population growth and an increase of 33,456 workers since 2017. Most of South Miami-Dade's traffic congestion occurs on the Florida Turnpike and U.S. 1 as workers commute north to their job locations.

According to the 2024 U.S. Census, approximately 69.2% of workers in the United States drive alone to their places of work each day. In South Miami-Dade, an estimated 72.2% of workers (205,799 workers) drive by car alone to their places of work (**See Table 7 below**). While the percentage of workers driving alone is down from 78.09% in 2017, South Miami-Dade has added 7,092 new resident workers who drive alone adding further congestion to the roadways. On a positive note, 12.31% of South Miami-Dade resident workers now work from home, up from 3.86% in 2017. However, excessive commute drive times have become a growing issue for South Miami-Dade resident workers who must travel a distance to their places of work.

Table 7: Means of Transportation to Work South Miami-Dade (2017-2024)

	Workers 16 years and over	Drove alone	Carpooled	Worked from home	Workers 16 years and over	Drove alone	Carpooled	Worked from home	Drove alone	Carpooled	Worked from home
	2017				**2024**				**% Point Change 2017-2024**		
Town of Cutler Bay	22,195	78.70%	10.80%	5.20%	22,441	71.20%	8.80%	16.10%	-7.50	-2.00	10.90
Florida City	3,910	50.20%	24.90%	7.20%	4,388	66.50%	16.80%	10.50%	16.30	-8.10	3.30
City of Homestead	27,723	67.30%	18.00%	4.90%	37,804	74.90%	13.30%	6.80%	7.60	-4.70	1.90
Village of Palmetto Bay	11,417	76.40%	14.50%	5.30%	12,353	60.30%	11.20%	21.20%	-16.10	-3.30	15.90
Village of Pinecrest	9,179	75.30%	3.90%	12.20%	8,455	61.00%	6.50%	27.00%	-14.30	2.60	14.80
Census Designated Places (Unincorporated)											
Country Walk CDP	7,702	87.00%	7.20%	2.70%	10,087	74.20%	9.90%	13.80%	-12.80	2.70	11.10
Goulds CDP	3,944	71.80%	15.10%	2.70%	6,184	78.60%	11.20%	4.50%	6.80	-3.90	1.80
Homestead Base CDP	121	35.50%	5.00%	2.50%	141	5.70%	49.60%	1.40%	-29.80	44.60	-1.10
Kendall CDP	38,247	83.10%	6.60%	4.10%	39,445	69.30%	8.30%	15.50%	-13.80	1.70	11.40
Leisure City CDP	10,417	68.50%	20.00%	4.30%	11,756	74.70%	11.30%	9.60%	6.20	-8.70	5.30
Naranja CDP	3,879	82.40%	9.40%	2.20%	6,914	70.30%	13.10%	12.30%	-12.10	3.70	10.10
Palmetto Estates CDP	7,484	75.80%	9.90%	1.60%	7,510	80.40%	10.40%	4.50%	4.60	0.50	2.90
Princeton CDP	12,140	73.90%	16.60%	3.30%	20,930	68.50%	12.20%	14.20%	-5.40	-4.40	10.90
Richmond Heights CDP	5,070	73.50%	9.70%	0.50%	4,876	75.60%	11.00%	6.90%	2.10	1.30	6.40
Richmond West CDP	18,695	82.60%	10.60%	3.00%	17,441	75.30%	9.70%	12.00%	-7.30	-0.90	9.00
South Miami Heights CDP	17,709	80.30%	10.30%	2.10%	18,145	77.50%	11.40%	7.70%	-2.80	1.10	5.60
The Crossings CDP	11,409	84.30%	8.00%	3.30%	12,090	78.20%	7.80%	11.70%	-6.10	-0.20	8.40
The Hammocks CDP	30,004	82.60%	9.30%	2.30%	30,005	71.10%	12.20%	12.60%	-11.50	2.90	10.30
Three Lakes CDP	8,484	85.90%	8.40%	2.30%	9,172	75.10%	7.50%	14.00%	-10.80	-0.90	11.70
West Perrine CDP	4,040	74.90%	11.00%	2.90%	4,864	76.20%	10.30%	3.40%	1.30	-0.70	0.50
South Miami-Dade	**253,769**	**78.09%**	**11.20%**	**3.86%**	**285,001**	**72.21%**	**10.65%**	**12.31%**	**-5.88**	**-0.54**	**8.45**
Miami-Dade County	**1,251,193**	**76.80%**	**8.90%**	**4.90%**	**1,356,445**	**68.70%**	**9.10%**	**14.00%**	**-8.10**	**0.20**	**9.10**

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

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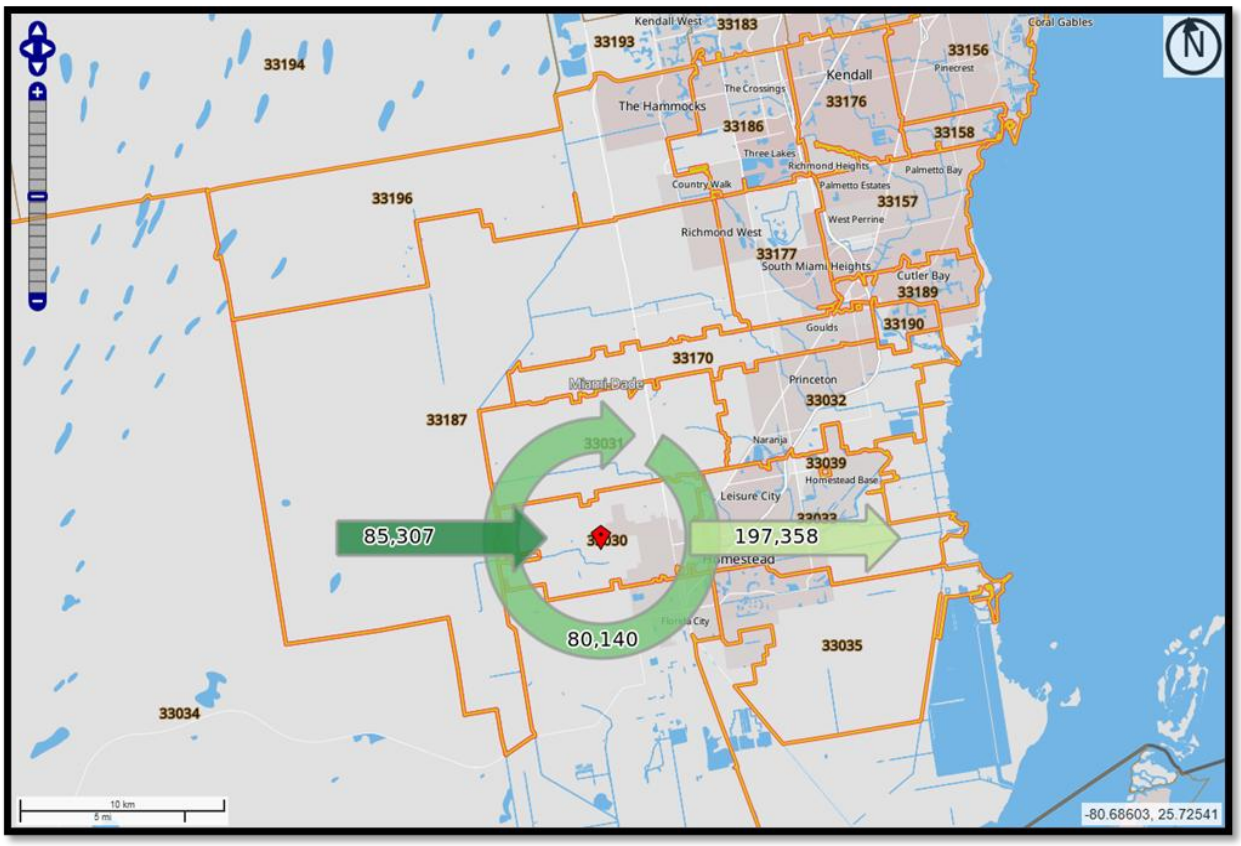
I. Employment Inflow/Outflow

The US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) data tracks where workers live and work. The most recent LEHD data captures employment data slightly differently than the Bureau of Labor Statistics. LEHD indicates a significant mismatch between the jobs located within the trade area, and where employed residents actually work. As shown in **Figure 3**, the key indicators of the Inflow/Outflow analysis available through the LEHD data are as follows:

- Although 277,498 employed residents live in South Miami-Dade, only 80,140 of workers, or 28.87 percent, work in South Miami-Dade;
- This means 197,358 employed residents are employed by businesses somewhere else in the County or beyond;
- This also means 85,307 jobs within South Miami-Dade are filled by workers who live outside and commute in and out of South Miami-Dade;
- The destinations of most South Miami-Dade workers who commute are primarily located within Miami-Dade County; and
- The average commute time for resident employed workers in South Miami-Dade is over 35 minutes each way.

The LEHD analysis does not definitively mean that all resident workers employed outside South Miami-Dade leave each day. Telecommuting data indicates that a significant percentage of the local population mirrors national trends in working from home. However, the Inflow/Outflow analysis does indicate that continuing this pattern without a significant change in working locations, cannot be sustained and risks exacerbating South Miami-Dade's long commutes, traffic congestion, and negatively affecting production, services, and quality of life.

Figure 3: South Miami-Dade Job Inflow / Outflow (2023)



Source: Census On the Map, 2023

An analysis of job counts by specific work locations shows that most South Miami-Dade resident workers are employed in the City of Miami (47,572) followed by Kendall CDP (17,445), the City of Coral Gables (14,179), the City of Doral (12,233), and the City of Homestead (**Table 8**). The balance of workers are employed in municipalities throughout Miami-Dade County.

Table 8: Job Counts by Places where South Dade Residents are Employed - All Jobs (2023)

	Count	Share
Miami City	47,572	17.1%
Kendall CDP	17,445	6.3%
Coral Gables City	14,179	5.1%
Doral City, FL	12,233	4.4%
City of Homestead	10,106	3.6%
Three Lakes CDP	7,251	2.6%
Hialeah City	4,709	1.7%
Palmetto Bay Village	4,310	1.6%
Fort Lauderdale City	4,203	1.5%
Town of Cutler Bay	4,198	1.5%
All Other Locations	151,292	54.5%
Total All Jobs	**277,498**	**100.0%**

Source: Census On the Map, 2023

A further analysis of commute distances shows that 74.4% or workers travel 24 miles or less, which is indicative of the distance to the primary job locations shown above. The balance of workers travel 25 miles or more to their work locations, including 12.2% (33,951 workers) who travel greater than 50 miles to their places of work (**Table 9**).

Table 9: Job Counts by Distance (2023)

	Count	Share
Total All Jobs	277,498	100.0%
Less than 10 miles	97,004	35.0%
10 to 24 miles	109,345	39.4%
25 to 50 miles	37,198	13.4%
Greater than 50 miles	33,951	12.2%

Source: Census On the Map, 2023

J. Housing

According to 2024 ACS estimates, there are 204,353 occupied housing units in South Miami-Dade (**Table 10**). This represents a 22.5 percent (37,495 units) increase since 2017. South Miami-Dade's housing supply growth rate far exceeded Miami-Dade County (13.6%) during this period.

Homestead and Florida City experienced the largest housing supply growth rates among municipalities. Naranja (84.2%), Princeton (70.6%) and Goulds (39.2%) had the highest housing supply growth rates among the CDPs.

Table 10: Housing Units and Tenure in South Miami-Dade (2017- 2024)

Municipalities and CDPs	Occupied Housing Units			Owner Occupied		
	2017	2024	% Change	2017	2024	% Change
Town of Cutler Bay	12,682	14,469	14.1%	8,965	10,089	12.5%
Florida City	2,780	4,081	46.8%	727	1,274	75.2%
City of Homestead	18,499	25,638	38.6%	7,253	12,372	70.6%
Village of Palmetto Bay	7,298	8,150	11.7%	6,220	6,376	2.5%
Village of Pinecrest	5,954	6,081	2.1%	4,584	5,037	9.9%
Census Designated Places (Unincorporated)						
Country Walk CDP	4,473	5,630	25.9%	3,805	4,496	18.2%
Goulds CDP	3,145	4,347	38.2%	1,523	2,438	60.1%
Kendall CDP	27,228	30,158	10.8%	17,181	18,747	9.1%
Leisure City CDP	6,755	8,150	20.7%	3,336	3,552	6.5%
Naranja CDP	2,780	5,122	84.2%	700	1,254	79.1%
Palmetto Estates CDP	3,824	4,223	10.4%	2,858	3,646	27.6%
Princeton CDP	7,290	12,439	70.6%	4,368	8,626	97.5%
Richmond Heights CDP	2,641	3,020	14.4%	2,083	2,141	2.8%
Richmond West CDP	9,401	10,617	12.9%	8,041	8,898	10.7%
South Miami Heights CDP	10,570	12,012	13.6%	5,920	7,462	26.0%
The Crossings CDP	7,413	8,392	13.2%	5,745	6,096	6.1%
The Hammocks CDP	16,005	19,623	22.6%	9,379	12,308	31.2%
Three Lakes CDP	4,900	5,348	9.1%	3,275	3,563	8.8%
West Perrine CDP	2,869	3,235	12.8%	1,555	1,736	11.6%
Municipalities and CDPs Totals	**156,507**	**190,735**	**21.9%**	**97,518**	**120,111**	**23.2%**
South Miami-Dade	**166,858**	**204,353**	**22.5%**	**105,356**	**129,403**	**22.8%**
Miami-Dade County	**858,289**	**975,411**	**13.6%**	**448,011**	**509,440**	**13.7%**

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

III INDUSTRY STRUCTURE & DYNAMICS

A. Economic Base

The economic base represents the economic activities that occur within a specific geographic area whether that be a city, county, or region. The economic base encompasses the production, distribution, and consumption of goods and services within a defined area. Understanding the dynamics of a local economy starts with recognizing it as a community's economic ecosystem, where businesses, residents, and institutions interact financially. A healthy local economy is not just about businesses operating; it's about creating a system where wealth is generated and circulated locally, benefiting the community directly. This designation emphasizes the importance of local ownership, local supply chains, and local spending. The significance of this approach lies in its potential to build resilient, self-sustaining communities and regions.

The economic base of South Miami-Dade County is fused to the larger economy of the county. Miami-Dade County is the largest county in the State of Florida with a population over 2.7 million and the third largest in terms of land area covering nearly 2,000 square miles. Miami-Dade County's economic core runs north to south along the I-95/U.S. 1 Corridor on the east and the Florida Turnpike on the west. The county's economic strengths provide continued opportunities for South Miami-Dade, where the in-migration of a large prime working-age population over the past two decades has created a significant competitive advantage.

Miami-Dade County is a highly competitive economy in a range of industry sectors including healthcare, education, transportation, tourism and hospitality. The distinguishing characteristics of Miami-Dade County's economy include:

- ***Economic Scope*** – Miami-Dade County has the largest and most diversified economy in the State of Florida with a gross domestic product (GDP) of over $219 billion, an estimated 123,830 employer business establishments and 1,525,512 employer and self-employed jobs;
- ***A Diversified Industry Structure*** – In addition to healthcare, transportation, and leisure and hospitality, Miami-Dade County is home to growing technology sectors and employment in a wide range of high-end professional services, financial services, construction services and support, and manufacturing, especially aerospace components;
- ***Traded Industries*** - Miami-Dade County's top 10 traded industries are concentrated in industries requiring advanced education and/or professional skills, including management of companies and enterprises, legal services, management and technical consulting services, architectural and engineering services, computer systems design and related services;
- ***Growing Presence in the Advanced Industry Sector*** – The advanced industries sector encompasses 50 industries with the highest levels of skills, knowledge, growth, and value-added productivity. Advanced industries range from manufacturing such as automotive and aerospace to high-tech services such as computer software and computer system design. Advanced industries are also deeply engrained with technology research and development (R&D) and STEM (science, technology, engineering, and math);
- ***Growing Presence in the Advanced Industry Sector*** - The advanced industries sector encompasses 50 industries with the highest levels of skills, knowledge, growth, and value-added productivity.

Advanced industries range from manufacturing such as automotive and aerospace to high-tech services such as computer software and computer system design. Advanced industries are also deeply engrained with technology research and development (R&D) and STEM (science, technology, engineering, and math). Both Miami-Dade County and South Miami-Dade are home to a growing number of establishments and workers in the advanced industry sector with business establishments largely found in management, scientific, and technical consulting services, architectural and engineering, and computer systems design; and

- ***Foreign Trade Zone 32 & 281*** – Businesses conducting operations within Foreign Trade Zones (FTZs) or subzones – granted through the Greater Miami Chamber of Commerce (FTZ 32) or PortMiami (FTZ 281) – receive various benefits, including duty and tax deferrals and reductions. These advantages provide companies with opportunities to improve cash flow and enhance competitiveness.

B. Employment by Industry in South Miami-Dade and Miami-Dade County

According to 2025 data from LightCast, there are 1,525,512 jobs in Miami-Dade County, including both employer-based and self-employed (independent contractor) positions (**Table 11**). Of these, 195,385 are in Health Care, followed by Retail Trade (151,844), Government (150,381), Accommodations and Food Services (Tourism; 139,816), and Professional, Scientific, and Technical Services (120,600). Between 2017 and 2025, Miami-Dade County added 204,276 new jobs, representing a 15% growth rate. Industries with significant growth during this period include Health Care (37,558/24%), Professional and Technical Services (33,045/38%), Transportation and Warehousing (31,603/38%), Construction (20,455/29%), and Real Estate (11,418/31%).The only industry that declined in employment was Retail Trade, with a total loss of 1,340 jobs. This reduction aligns with national trends driven by the growth of e-commerce and shifting consumer preferences.

Table 11: Employer and Self-Employed Total Jobs by Industry, Miami-Dade County (2017- 2025)

NAICS	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Earnings Per Job	COL Adjusted Total Current Earnings
11	Agriculture, Forestry, Fishing and Hunting	12,350	16,474	4,124	33%	$44,601	$40,657
21	Mining, Quarrying, and Oil and Gas Extraction	532	609	77	14%	$146,099	$133,180
22	Utilities	2,536	3,161	624	25%	$177,943	$162,209
23	Construction	71,665	92,120	20,455	29%	$69,891	$63,711
31	Manufacturing	43,951	51,124	7,173	16%	$82,162	$74,897
42	Wholesale Trade	68,684	75,757	7,072	10%	$101,603	$92,619
44	Retail Trade	153,184	151,844	(1,340)	(1%)	$60,789	$55,414
48	Transportation and Warehousing	82,196	113,798	31,603	38%	$91,617	$83,516
51	Information	19,662	21,940	2,279	12%	$163,182	$148,753
52	Finance and Insurance	54,825	62,169	7,343	13%	$224,035	$204,225
53	Real Estate and Rental and Leasing	37,345	48,763	11,418	31%	$81,833	$74,597
54	Professional, Scientific, and Technical Services	87,556	120,600	33,045	38%	$133,493	$121,689

NAICS	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Earnings Per Job	COL Adjusted Total Current Earnings
55	Management of Companies and Enterprises	9,568	12,478	2,910	30%	$208,354	$189,931
56	Administrative and Support and Waste Management and Remediation Services	92,554	98,248	5,693	6%	$58,564	$53,385
61	Educational Services	43,494	53,912	10,417	24%	$72,981	$66,528
62	Health Care and Social Assistance	157,827	195,385	37,558	24%	$84,048	$76,616
71	Arts, Entertainment, and Recreation	19,718	25,549	5,831	30%	$94,207	$85,877
72	Accommodation and Food Services	128,944	139,816	10,872	8%	$47,217	$43,042
81	Other Services (except Public Administration)	84,696	89,411	4,715	6%	$42,667	$38,894
90	Government	148,654	150,381	1,726	1%	$107,336	$97,845
99	Unclassified Industry	1,293	1,973	680	53%	$73,060	$66,600
		1,321,236	**1,525,512**	**204,276**	**15.46%**	**$88,361**	**$80,547**

Source: LightCast 2017, 2025

Between 2017 and 2025, South Miami-Dade grew from 227,723 to 261,178 employer and self-employed jobs (**Table 12**), representing the creation of 33,456 new jobs (15%). As expected, industry job growth rates in South Miami-Dade generally mirror those of Miami-Dade County. Health Care ranked first, with (8,386/30%) new jobs created between 2017 and 2025, followed by Construction (6,183/33%) and Professional, Scientific, and Technical Services (5,311/45%). While retail jobs decreased across the county by 1,340, South Miami-Dade experienced a growth of 2,349 jobs, highlighting retail's continued role as a traditional component of the region's economic base. However, although the county saw an increase in government jobs (1,726), South Miami-Dade lost 3,287, which may be explained by federal funding cuts and reductions in federal aid. Despite this, it is important to note that during the same period, health care jobs significantly surpassed retail, signaling a shift away from traditional industries toward the targeted sectors identified in the *2020 Strategic Economic Development Plan for South Dade.* Both Miami-Dade and South Miami-Dade grew jobs by nearly the same percentage (15.46% and 14.69%) between 2017 and 2025.

Table 12: Employer and Self-Employed Total Jobs by Industry, South Miami-Dade (2017- 2025)

NAICS	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Earnings Per Job	COL Adjusted Total Current Earnings
11	Agriculture, Forestry, Fishing and Hunting	8,828	10,878	2,050	23%	$49,019	$44,685
21	Mining, Quarrying, and Oil and Gas Extraction	107	89	(18)	(17%)	$133,165	$121,391
22	Utilities	1,930	1,661	(269)	(14%)	$185,865	$169,430
23	Construction	18,515	24,698	6,183	33%	$70,388	$64,164
31	Manufacturing	6,194	5,578	(615)	(10%)	$75,160	$68,515
42	Wholesale Trade	6,022	7,986	1,964	33%	$99,410	$90,620
44	Retail Trade	26,919	29,267	2,349	9%	$60,816	$55,438

NAICS	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Earnings Per Job	COL Adjusted Total Current Earnings
48	Transportation and Warehousing	2,642	4,683	2,041	77%	$76,972	$70,166
51	Information	1,874	2,807	933	50%	$155,515	$141,764
52	Finance and Insurance	9,662	11,094	1,432	15%	$184,284	$167,989
53	Real Estate and Rental and Leasing	4,317	5,077	760	18%	$85,703	$78,125
54	Professional, Scientific, and Technical Services	11,812	17,123	5,311	45%	$133,386	$121,592
55	Management of Companies and Enterprises	655	780	125	19%	$214,568	$195,595
56	Administrative and Support and Waste Management and Remediation Services	14,203	14,892	688	5%	$53,125	$48,428
61	Educational Services	6,133	8,452	2,318	38%	$68,406	$62,357
62	Health Care and Social Assistance	27,952	36,339	8,386	30%	$80,522	$73,402
71	Arts, Entertainment, and Recreation	2,094	2,887	792	38%	$115,676	$105,447
72	Accommodation and Food Services	15,323	17,697	2,374	15%	$46,256	$42,166
81	Other Services (except Public Administration)	20,366	20,123	(243)	(1%)	$43,410	$39,571
90	Government	41,957	38,670	(3,287)	(8%)	$117,383	$107,004
99	Unclassified Industry	217	397	181	83%	$73,060	$66,600
		227,723	**261,178**	**33,456**	**14.69%**	**$85,010**	**$77,493**

Source: LightCast 2017, 2025

An analysis of South Miami-Dade to Miami-Dade County share of jobs shows that South Miami-Dade has consistently accounted for around 17% of total county jobs between 2017 and 2025 (**Table 13**).

Table 13: Employer-Based and Self-Employed Total Jobs Summary, South Miami-Dade and Miami-Dade County (2017-2025)

	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change
Miami-Dade	1,321,236	1,525,512	204,276	15.46%
South Miami-Dade	227,723	261,178	33,456	14.69%
South Miami-Dade %	**17.2%**	**17.1%**	**16.4%**	

Source: LightCast 2017, 2025; Computations by authors

C. Employer Business Characteristics

To provide a deeper understanding of South Miami-Dade County's employer industries, the FIU Jorge M. Pérez Metropolitan Center applied restricted-use datasets, including the Quarterly Census of Employment and Wages (QCEW) at the individual business establishment level. Access to these datasets using the most detailed and current data available provides critical insights into South Miami-Dade's economic base. The QCEW dataset enables the computation of the number of employer establishments, employment totals, average establishment size, total and average payroll, and average payroll for each industry in South Miami-Dade. It is important to note that employer establishments refer to businesses with paid employees and do not account for independent contractors or self-employed individuals.

The analysis found that South Miami-Dade has 11.9% (14,761) of the county's 123,830 employer establishments and 12.1% (152,039) of the county's 1,261,687 employer jobs (**Table 14**). Industries with

an establishment share exceeding these benchmarks can be considered competitive advantages for South Miami-Dade. For example, Agriculture - a traditional industry in South Miami-Dade - accounts for 55.5% of agricultural establishments and 88.3% of agricultural employment in Miami-Dade County highlighting why agriculture is a key component of South Miami Dade's economic base.

Traditional industries with a significant presence in South Miami-Dade include High-value Retail and Specialty and General Retail, which account for 18.5% and 23% of employer jobs, respectively. In terms of emerging targeted industries, South Miami-Dade hosts 2,436 (15%) of Miami-Dade County's 16,283 health care establishments and 14.2% of the county's Health Care employment, indicating a strong presence of health care in South Miami-Dade. Although slightly below the standard South Miami-Dade-to-Miami-Dade County ratio, Finance and Insurance shows a growing presence in South Miami-Dade accounting for 720 (10.9%) of Miami-Dade's 6,588 employer establishments and 5,806 (10.6%) of Miami-Dade's 54,945 employer jobs. In Professional, Scientific, and Technical Services, South Miami-Dade accounts for 2,133 (9.5%) of Miami-Dade's 22,556 establishments, and 10,448 (10.2%) of Maimi-Dade's 102,888 employment. Note that for each of the targeted industries the percentage of South Miami-Dade to Miami-Dade employment follow closely the same ratios as their corresponding percentages of South Miami-Dade to Miami-Dade establishments. This is easier to observe in the comparison of average number of employees per establishment between South Miami-Dade and Miami-Dade County.

Table 14: Employer Establishment Counts and Employment by Industry, South Miami-Dade and Miami-Dade (2025)

NAICS	Industries	Miami-Dade	South Miami-Dade	South Miami-Dade	Miami-Dade	South Miami-Dade	South Miami-Dade	Miami-Dade	South Miami-Dade
2-Digit	Description	Establishments	Establishments	Percent	Employment	Employment	Percent	Avg. Employees per establishment	Avg. Employees per establishment
11	Agriculture, Forestry, Fishing and Hunting	530	294	55.5%	8,396	7,411	88.3%	15.8	25.2
21	Mining, Quarrying, and Oil and Gas Extraction	38	10	26.3%	555	55	9.9%	14.6	5.5
22	Utilities	120	12	10.0%	2,956	867	29.3%	24.6	72.3
23	Construction	8,531	1,542	18.1%	59,965	11,348	18.9%	7.0	7.4
31	Food, Textile, and Apparel Manufacturing	846	96	11.3%	9,878	999	10.1%	11.7	10.4
32	Wood, Paper, Petroleum, Chemical Manufacturing	919	92	10.0%	14,729	1,317	8.9%	16.0	14.3
33	Metal, Machinery, and Transportation Manufacturing	1,704	166	9.7%	21,301	2,090	9.8%	12.5	12.6
42	Wholesale Trade	8,554	780	9.1%	71,983	7,026	9.8%	8.4	9.0
44	Traditional and High Value Retailers	4,945	652	13.2%	69,850	16,038	23.0%	14.1	24.6
45	Specialty and General Retailers	7,052	877	12.4%	69,349	12,836	18.5%	9.8	14.6
48	Transportation	3,717	278	7.5%	68,573	1,503	2.2%	18.4	5.4
49	Warehousing	726	67	9.2%	30,703	2,018	6.6%	42.3	30.1
51	Information	2,527	218	8.6%	18,887	2,176	11.5%	7.5	10.0
52	Finance and Insurance	6,588	720	10.9%	54,945	5,806	10.6%	8.3	8.1
53	Real Estate and Rental and Leasing	7,190	666	9.3%	36,258	2,518	6.9%	5.0	3.8
54	Professional, Scientific, and Technical Services	22,556	2,133	9.5%	102,888	10,448	10.2%	4.6	4.9
55	Management of Companies and Enterprises	1,128	78	6.9%	12,291	645	5.2%	10.9	8.3
56	Administrative and Support and Waste Management and Remediation Services	7,042	1,023	14.5%	75,050	9,953	13.3%	10.7	9.7
61	Educational Services	1,715	248	14.5%	74,056	5,924	8.0%	43.2	23.9

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NAICS	Industries	Miami-Dade	South Miami-Dade	South Miami-Dade	Miami-Dade	South Miami-Dade	South Miami-Dade	Miami-Dade	South Miami-Dade
2-Digit	Description	Establishments	Establishments	Percent	Employment	Employment	Percent	Avg. Employees per establishment	Avg. Employees per establishment
62	Health Care and Social Assistance	16,283	2,436	15.0%	196,328	27,900	14.2%	12.1	11.5
71	Arts, Entertainment, and Recreation	1,976	197	10.0%	20,743	1,872	9.0%	10.5	9.5
72	Accommodation and Food Services	6,971	759	10.9%	133,423	15,194	11.4%	19.1	20.0
81	Other Services (except Public Administration)	9,073	1,118	12.3%	39,933	4,937	12.4%	4.4	4.4
92	Public Administration	195	9	4.6%	67,819	1,067	1.6%	347.8	118.6
99	Unclassified	2,904	290	10.0%	828	91	11.0%		
	Totals	**123,830**	**14,761**	**11.9%**	**1,261,687**	**152,039**	**12.1%**		

Source: Quarterly Census of Employment and Wages, 2025

The ratio pattern does not hold in the Transportation and Warehousing industry. In South Miami-Dade, the average number of employees per warehousing establishment is 30.1 compared to 42.3 in Miami-Dade County. One possible explanation for this difference is that the economic opportunity and interest in building new warehousing in South Miami-Dade is driven not only by lower land cost, but also by the ability to design facilities that can accommodate sophisticated robotics from the outset, which require fewer employees per establishment to operate. Accommodating modern warehouse facilities for robotics and automation requires taller warehouse ceilings as well as firmer floors capable of withstanding heavier loads. These structural features are more difficult to achieve in Miami-Dade's logistic hub located west of the Miami International Airport (MIA), where retrofitting older warehouses would be significantly more expensive or cost prohibitive.

In terms of total payroll per industry – the total amount paid to all employees – no other industry in South Miami-Dade generated more payroll than Health Care, at $1.75 billion, distantly followed by Professional, Scientific, and Technical Services at $892 million (**Table 15**). Both are considered targeted emerging industries. Among the remaining targeted industries, Finance and Insurance ranked third, generating $552 million in total payroll, followed by Warehousing ($150 million), Transportation ($96 million), and Arts, Entertainment and Recreation ($65 million). In total, all employer establishments in South Miami-Dade generated $8.98 billion in payroll, representing 9.3% of the $96.1 billion total payroll generated in Miami-Dade County.

Table 15: Employer Total Payroll and Average Payroll by Industry, South Miami-Dade and Miami-Dade (2025)

NAICS	Industries	Miami-Dade	South Miami-Dade	South Miami-Dade	Miami-Dade	South Miami-Dade	South Miami-Dade
2-Digit	Description	Total Payroll	Total Payroll	Percent	Average Payroll	Average Payroll	Percent
11	Agriculture, Forestry, Fishing and Hunting	$408,757,044	$365,251,312	89.4%	$48,685	$49,285	101%
21	Mining, Quarrying, and Oil and Gas Extraction	$64,317,064	$3,864,844	6.0%	$115,887	$70,270	61%
22	Utilities	$370,663,920	$130,442,140	35.2%	$125,394	$150,452	120%
23	Construction	$4,142,686,436	$682,615,396	16.5%	$69,085	$60,153	87%
31	Food, Textile, and Apparel Manufacturing	$507,220,412	$44,784,832	8.8%	$51,348	$44,830	87%
32	Wood, Paper, Petroleum, Chemical Manufacturing	$1,061,263,228	$128,980,212	12.2%	$72,053	$97,935	136%
33	Metal, Machinery, and Transportation Manufacturing	$1,458,320,540	161,475,900	11.1%	$68,463	$77,261	113%
42	Wholesale Trade	$6,022,164,896	$529,829,724	8.8%	$83,661	$75,410	90%
44	Traditional and High Value Retailers	$3,765,361,760	$805,446,076	21.4%	$53,906	$50,221	93%
45	Specialty and General Retailers	$3,049,769,980	$447,138,540	14.7%	$43,977	$34,835	79%
48	Transportation	$5,878,091,048	$96,004,808	1.6%	$85,720	$63,875	75%
49	Warehousing	$1,764,618,804	$150,489,896	8.5%	$57,474	$74,574	130%
51	Information	$2,630,530,144	$332,196,376	12.6%	$139,277	$152,664	110%
52	Finance and Insurance	$8,826,477,000	$552,912,456	6.3%	$160,642	$95,231	59%
53	Real Estate and Rental and Leasing	$2,498,419,488	$137,683,448	5.5%	$68,907	$54,680	79%
54	Professional, Scientific, and Technical Services	$12,062,630,224	$892,894,588	7.4%	$117,240	$85,461	73%
55	Management of Companies and Enterprises	$1,750,969,452	$71,826,780	4.1%	$142,459	$111,359	78%
56	Administrative and Support and Waste Management and Remediation Services	$4,110,029,460	$530,660,940	12.9%	$54,764	$53,317	97%
61	Educational Services	$392,505,604	$312,843,820	5.8%	$72,817	$52,810	73%
62	Health Care and Social Assistance	$14,130,626,580	$1,752,065,848	12.4%	$71,975	$62,798	87%
71	Arts, Entertainment, and Recreation	$1,733,738,236	$65,229,648	3.8%	$83,582	$34,845	42%
72	Accommodation and Food Services	$5,813,700,484	$478,416,252	8.2%	$43,573	$31,487	72%
81	Other Services (except Public Administration)	$2,044,076,860	$221,072,164	10.8%	$51,188	$44,779	87%
92	Public Administration	$6,660,924,752	$83,192,132	1.2%	$98,216	$77,968	79%
99	Unclassified	$45,948,804	$ 6,407,096	13.9%	$55,494	$70,408	127%
	Totals	**$96,193,812,220**	**$8,983,725,228**	**9.3%**			

Source: Quarterly Census of Employment and Wages, 2025

D. Employment Size and Structure

One of the core goals of the *2020 Economic Development Strategic Plan for South Dade* was to support small businesses' growth and their 24-month survival milestone. Proposed solutions included the creation of small business week, offering technical assistance and workshops, and the creation of a one-stop resource center to help connect small business owners to community resources- housed through the EDC of South Miami-Dade website. Although some of these proposed initiatives have yet to take off, including the development of a small business online resources portal, it is important to consider the local firm size

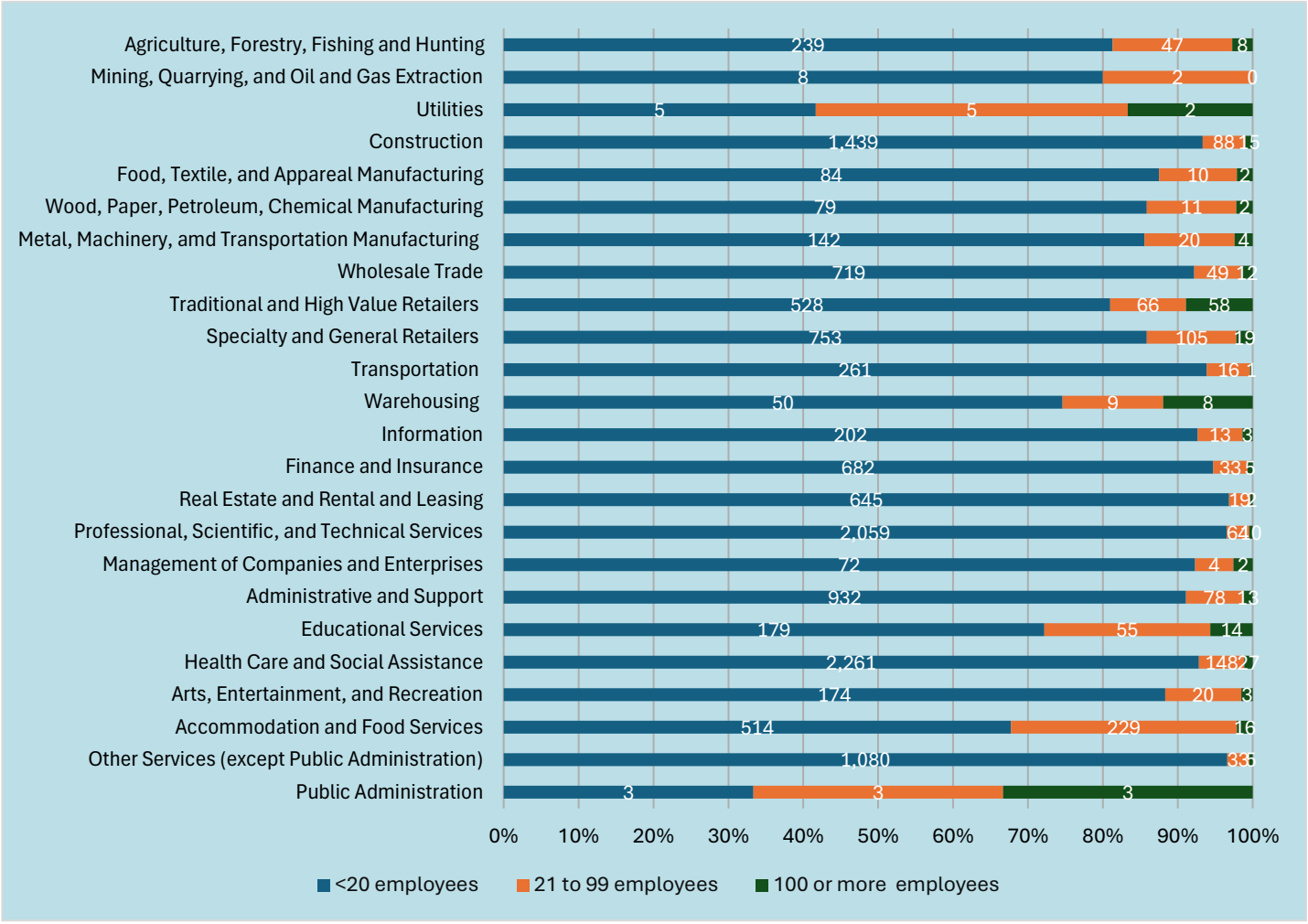
structure of South Miami-Dade. As shown in **Table 16**, 13,400 (91%) of the 14,761 employer businesses are small, having 20 or less employees. While small businesses with 20 employees or less comprise the vast number of business establishments in both South Miami-Dade and Miami-Dade County, it is significant to note that the 234 businesses in South Miami-Dade with 100+ employees generate 62,612 jobs. **Figure 4** illustrates the size composition of employer businesses in South Miami-Dade by industry.

Table 16: Business Employment Size Structure in South Miami-Dade 2025

Number of Employees	Number of Businesses	% of Businesses	Total Employees	% of Employees
<20	13,400	91%	44,240	29%
21 to 99	1,127	8%	45,187	30%
100 or more	234	2%	62,612	41%
Total	**14,761**	**100%**	**152,039**	**100%**

Source: Quarterly Census of Employment and Wages, 2025

Figure 4: Businesses by Employment Size Structure and Industry - South Miami-Dade (2025)



Source: Quarterly Census of Employment and Wages, 2025

E. Industry Clusters

Competitive and resilient local economies are characterized by the spatial concentration and organization of production and services among industry growth sectors. These concentrations or clusters consist of companies, suppliers, and services which provide inputs to each other and rely on each other for growth. Industry clusters are a central component of economic competitiveness — they bring together technology, information, specialized talent, competing companies, academic institutions, and other linkages and organizations in close proximity to yield better market information, pools of specialized talent, and faster deployment of new knowledge. Improving the performance of clusters, not just individual companies, is a central feature of leading economic development policy.

Targeting economic development resources on priority industries and industry clusters is a traditional means of strategically allocating resources and effort to support those industries where public and private investment can have the biggest impact on future economic growth. Targeting policy and programs means building on existing local strengths - identifying and applying resources on industries with proven capabilities, infrastructure, and assets on which to grow. Focusing policy, programs, and resources on a small set of critical industries has many advantages including:

- Identifying and targeting industries with the greatest local economic impact and probabilities for growth increases the effectiveness of local policy and program initiatives, ensuring that scarce dollars are invested in industries and industry clusters that will have the most significant impact on the rest of the local economy;
- Target, cluster-based strategies can improve local economic performance by addressing the common needs of local businesses, and further improve the effectiveness of local policy;
- Developing efficient and effective economic development policy is especially critical in the current political climate, as local governments will be dealing with considerably lower levels of state and federal funding support for the foreseeable future;
- Cluster strategies permit the integration and targeting of resources in ways that are consistent with the multiple goals of economic development programs: business recruitment, retention, expansion and new-business creation;
- Creating a local cluster framework as part of a local economic development strategic plan can help mobilize highly committed employers, foster collaboration by bringing together participants from targeted industries and help implement the actions identified in the collaborative process. Job creation and new entrepreneurial innovations are more likely to flourish in such a collaborative environment. Examples include Silicon Valley, California and the Research Triangle in North Carolina;
- Proper targeting of resources and programs will result in faster economic growth than scattershot efforts, or programs trying to build entirely new industries where they did not exist before; and
- A carefully target industry program and policy builds on established local industry experience, expertise, and talent, which is a critical component in creating a successful entrepreneurial ecosystem. Rates of successful new business start-ups, survival, and growth rates are considerably higher for new businesses supplying the needs of existing, established, strong local industry sectors.

The Miami-Dade Beacon Council, as part of its One Community One Goal (OCOG) Targeted Industry Strategic Plan identified and described seven "target industries" in the county. These include:

1) Aviation
2) Creative Industries
3) Financial Services
4) Hospitality & Tourism
5) Life Sciences & Health Care
6) Technology
7) Trade & Logistics

The *2020 Strategic Economic Development Plan for South-Dade* identified targeted industries which fell into two groupings: Emerging Industries and Traditional Industries. The Emerging Industries coincide, for the most part, with the OCOG target industries including Health Care, Aviation Maintenance Repair & Overhaul (MRO), Tourism, Professional Services, Logistics, and Insurance. These industries were projected "to experience significant growth within the foreseeable future." For Traditional Industries such as Defense, Agriculture, and Retail, regional growth "was expected to be slow, static, or negative when compared to the past."

F. Advanced Industries Sector

An important measure of a region's competitiveness and growth potential is the presence of business establishments in the Advanced Industries Sector. According to the Brookings Institution, the Advanced Industries Sector includes important regional core industries that drive many of the nation's best performing regional economies. From a local economic development perspective, not only do these core industries help improve economic competitiveness, but they also provide acutely needed high-skill, high paying employment opportunities.

The Advanced Industries Sector is composed of 50 industries identified at the 4-digit NAICS level, and includes manufacturing industries, chemicals, pharmaceuticals, advanced metals, industrial machinery, medical equipment manufacture, energy development and distribution, software design, data processing and hosting, and medical and diagnostic labs.

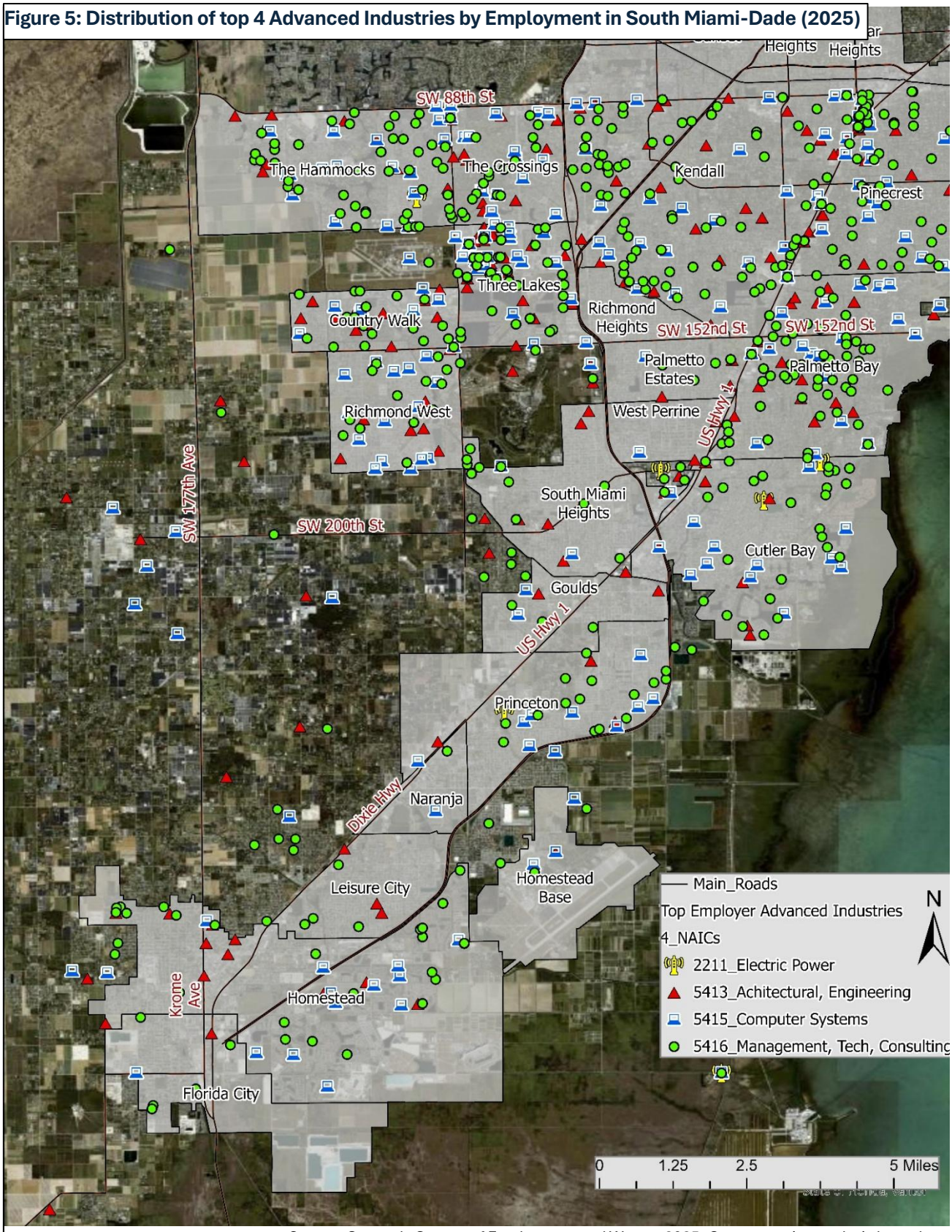
Miami-Dade County has an increasing proportion of business establishments and employees in the advanced industries sector (see **Appendix A**). Advanced industry employment in South Miami-Dade generally compares with Miami-Dade County, but at a smaller scale. South Miami-Dade is home to a significant number of establishments (349) and workers (3,152) in the advanced industry sector (**Table 17**). South Miami-Dade jobs in the advanced industries sector are largely found in Management, Scientific, and Technical Consulting Services (528 establishments), Architectural, Engineering (243 establishments, and Computer Systems Design and Related Services (230 establishments). **Figure 5** provides the spatial distribution of South Miami-Dade's top 4 advanced industries by employment.

Table 17: Advanced Industry Employer Establishment and Employment, South Miami-Dade (2025)

4-Digit	Description	Establishments	Employment	Total Payroll	Average Payroll
5413	Architectural, Engineering, and Related Services	243	1,503	$123,449,664	$82,136
5416	Management, Scientific, and Technical Consulting Services	528	1,256	$118,059,256	$93,996
2211	Electric Power Generation, Transmission and Distribution	7	803	$125,965,900	$156,869
5415	Computer Systems Design and Related Services	230	696	$78,405,280	$112,651
5182	Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services	30	568	$212,955,368	$374,921
3254	Pharmaceutical and Medicine Manufacturing	6	566	$49,377,764	$87,240
3366	Ship and Boat Building	13	487	$26,500,296	$54,415
6215	Medical and Diagnostic Laboratories	40	378	$20,822,384	$55,086
3364	Aerospace Product and Parts Manufacturing	13	331	$24,209,132	$73,139
3391	Medical Equipment and Supplies Manufacturing	23	321	$37,247,308	$116,035
5417	Scientific Research and Development Services	44	184	$12,962,304	$70,447
3339	Other General Purpose Machinery Manufacturing	7	114	$7,187,536	$63,049
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	9	109	$21,828,244	$200,259
3353	Electrical Equipment Manufacturing	4	103	$3,661,496	$35,549
3341	Computer and Peripheral Equipment Manufacturing	2	101	$9,933,780	$98,354
3369	Other Transportation Equipment Manufacturing	3	84	$6,008,996	$71,536
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	6	62	$6,451,268	$104,053
3399	Other Miscellaneous Manufacturing	12	51	$2,689,120	$52,728
3331	Agriculture, Construction, and Mining Machinery Manufacturing	4	40	$2,444,192	$61,105
3342	Communications Equipment Manufacturing	3	36	$3,747,696	$104,103

Source: Quarterly Census of Employment and Wages, 2025

Figure 5: Distribution of top 4 Advanced Industries by Employment in South Miami-Dade (2025)



Source: Quarterly Census of Employment and Wages, 2025; Geoprocessing analysis by authors

G. Economic Geography of South Miami-Dade

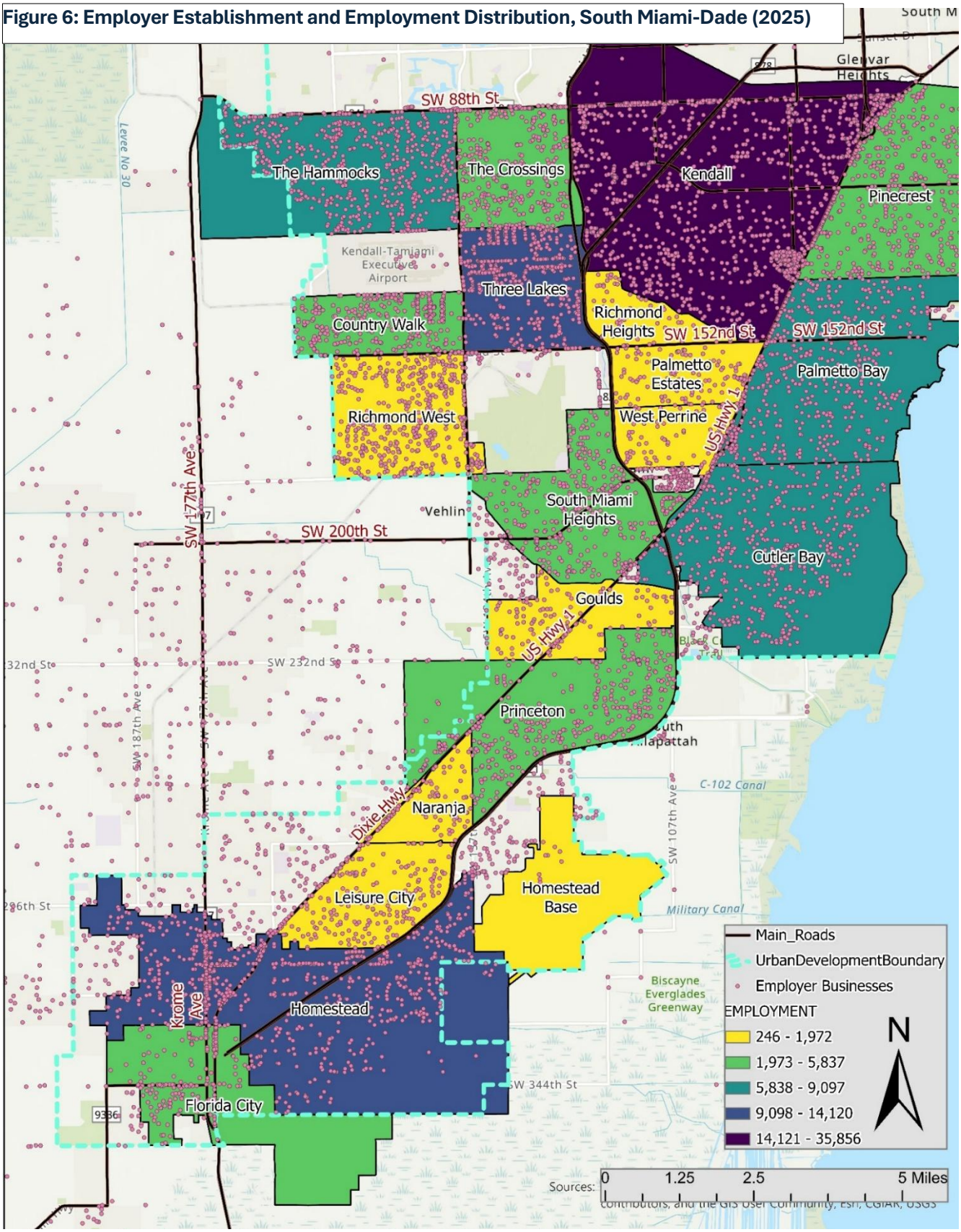
Using QCEW data, an analysis was performed to determine the spatial distribution of employer establishments in South Miami-Dade County by municipality and CDP (**Table 18**). Coordinates were available for 96.8% of establishments which account for 98.7% of total employment in the South Miami-Dade (**Figure 6**). Among the municipalities, The City of Homestead has the highest concentration of employer-based businesses (1,093) and employees (13,158). Among CDPs, Kendall (2,705/35,856) and Three Lakes (1,347/14,120) have the highest concentrations of employer establishments and employees.

Table 18: Employer Establishment and Employment by Municipalities, South Miami-Dade (2025)

GEOID	Municipalities and CDPs	Employer Businesses	Employment	Annual Payroll
1232275	**City of Homestead**	1,093	13,158	$662,610,572
1254275	**Village of Palmetto Bay**	874	6,762	$396,660,376
1215968	**Town of Cutler Bay**	755	6,378	$279,047,448
1256625	**Village of Pinecrest**	926	5,837	$360,308,432
1222975	**Florida City**	311	4,874	$391,768,308
	Municipalities Totals	**3,959**	**37,009**	**$2,090,395,136**
1236100	**Kendall CDP**	2,705	35,856	$2,617,523,788
1271741	**Three Lakes CDP**	1,347	14,120	$837,144,828
1271569	**The Hammocks CDP**	988	9,097	$585,870,148
1215055	**Country Walk CDP**	536	5,679	$345,853,592
1267575	**South Miami Heights CDP**	439	5,167	$311,216,952
1271567	**The Crossings CDP**	464	3,859	$170,479,280
1258975	**Princeton CDP**	428	3,491	$182,400,644
1260230	**Richmond West CDP**	532	1,972	$75,526,212
1239950	**Leisure City CDP**	236	1,376	$50,789,588
1254300	**Palmetto Estates CDP**	152	1,350	$47,334,236
1276700	**West Perrine CDP**	117	1,028	$47,063,448
1247700	**Naranja CDP**	137	935	$29,622,108
1226950	**Goulds CDP**	153	760	$32,094,600
1260225	**Richmond Heights CDP**	76	484	$19,215,068
1232325	**Homestead Base CDP**	36	246	$18,048,504
	CDPs Totals	**8,346**	**85,420**	**$5,370,182,996**

Source: Quarterly Census of Employment and Wages, 2025

Figure 6: Employer Establishment and Employment Distribution, South Miami-Dade (2025)



Source: Quarterly Census of Employment and Wages, 2025; Geoprocessing analysis by authors

H. Self-Employed Workers

There are 36,385 total number of self-employed workers in South Miami-Dade (**Table 19**). This represents 13.9% of total employment. Self-employed workers are a growing percentage of the labor force and include a range of occupations within a cross-sector of industries. The total number of self-employed workers has increased by 30% since 2017.

In South Miami-Dade, the largest number of self-employed workers are in Construction (9,333 workers), other services, except Public Administration (5,334 workers), and Administrative and Waste Management Services (5,027 workers). Two growing sectors of note since 2017 are Health Care and Social Assistance (68% increase) and Manufacturing (63% increase).

Table 19: Self-Employed Workers in South Miami-Dade

NAICS	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Earnings Per Job	COL Adjusted Total Current Earnings
11	Agriculture, Forestry, Fishing and Hunting	395	755	360	91%	$47,002	$42,846
21	Mining, Quarrying, and Oil and Gas Extraction	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data
22	Utilities	26	45	19	74%	$56,540	$51,540
23	Construction	7,028	9,333	2,304	33%	$41,093	$37,459
31	Manufacturing	457	744	287	63%	$47,694	$43,476
42	Wholesale Trade	384	412	28	7%	$73,557	$67,053
44	Retail Trade	1,247	1,715	468	38%	$43,030	$39,225
48	Transportation and Warehousing	1,064	1,454	390	37%	$44,311	$40,393
51	Information	236	308	71	30%	$37,715	$34,381
52	Finance and Insurance	427	715	288	68%	$102,187	$93,151
53	Real Estate and Rental and Leasing	1,740	1,814	74	4%	$60,228	$54,903
54	Professional, Scientific, and Technical Services	1,979	2,764	784	40%	$67,907	$61,902
55	Management of Companies and Enterprises	0	0	0	0%	$0	$0
56	Administrative and Support and Waste Management and Remediation Services	4,240	5,027	787	19%	$30,024	$27,369
61	Educational Services	653	818	165	25%	$35,841	$32,672
62	Health Care and Social Assistance	2,003	3,373	1,370	68%	$65,966	$60,133
71	Arts, Entertainment, and Recreation	701	815	114	16%	$39,182	$35,718
72	Accommodation and Food Services	553	958	404	73%	$38,267	$34,883
81	Other Services (except Public Administration)	4,781	5,334	553	12%	$29,327	$26,733
90	Government	0	0	0	0%	$0	$0
99	Unclassified Industry	0	0	0	0%	$0	$0
		27,916	**36,385**	**8,469**	**30%**	**$44,935**	**$40,962**

Source: LightCast 2017, 2025

I. Benchmarking South Miami-Dade's Employment Growth to Miami-Dade County: 2017-2025

The *2020 Strategic Economic Development Plan for South-Dade* identified targeted industries which fell into two groupings: Emerging Industries and Traditional Industries. Emerging Industries coincide, for the most part, with the Beacon Council's One Community One Goal (OCOG) target industries including Health Care, Aviation Maintenance Repair & Overhaul (MRO), Tourism, Professional Services, Logistics, and Insurance. These industries were projected "to experience significant growth within the foreseeable future." For Traditional Industries such as Defense, Agriculture, and Retail, regional growth "was expected to be slow, static, or negative when compared to the past."

For those Emerging Industries or critical area industries detailed within the goal was by 2027 to increase the growth in number of jobs by a multiplier of 1.5 times the historic ratio (20%) of South Miami-Dade vs. county-wide jobs for a specific industry. The plan noted that while population growth had been a considerable driver of growth and would continue to be robust for the foreseeable future, South Miami-Dade was not generating the jobs to support its resident base when compared to other areas of the county.

A benchmark analysis of industry job growth in South Miami-Dade 2017-2025 indicates the region fell short in most industry categories including the Emerging Industries targeted in the 2017 plan (**see Table 20 below**). Significant job growth shortfalls are found in Health Care and Professional, Scientific, and Technical Services, Transportation and Warehousing (Logistics), and to a lesser extent, Accommodation and Food Services (Tourism), and Finance and Insurance. The Manufacturing sector also fell way short of its targeted growth level. However, an analysis of the Aviation sector found significant growth in Aerospace Product and Parts Manufacturing.

Table 20: Industry Benchmarks (2017-2025)

NAICS	Description	2017 - 2025 Miami-Dade Job Growth	2017 - 2025 Targeted Growth for South Miami-Dade	2017 - 2025 Actual Growth for South Miami-Dade	Growth Surplus or Deficit to Targeted Growth
11	Agriculture, Forestry, Fishing and Hunting	4,124	1,237	2,050	813
21	Mining, Quarrying, and Oil and Gas Extraction	77	23	(18)	(41)
22	Utilities	624	187	(269)	(457)
23	Construction	20,455	6,137	6,183	47
31	Manufacturing	7,173	2,152	(615)	(2,767)
42	Wholesale Trade	7,072	2,122	1,964	(158)
44	Retail Trade	(1,340)	(402)	2,349	2,751
48	**Transportation and Warehousing**	**31,603**	**9,481**	**2,041**	**(7,440)**
51	Information	2,279	684	933	249
52	**Finance and Insurance**	**7,343**	**2,203**	**1,432**	**(771)**
53	Real Estate and Rental and Leasing	11,418	3,425	760	(2,666)
54	**Professional, Scientific, and Technical Services**	**33,045**	**9,913**	**5,311**	**(4,603)**
55	Management of Companies and Enterprises	2,910	873	125	(748)

NAICS	Description	2017 - 2025 Miami-Dade Job Growth	2017 - 2025 Targeted Growth for South Miami-Dade	2017 - 2025 Actual Growth for South Miami-Dade	Growth Surplus or Deficit to Targeted Growth
56	Administrative and Support and Waste Management and Remediation Services	5,693	1,708	688	(1,020)
61	Educational Services	10,417	3,125	2,318	(807)
62	**Health Care and Social Assistance**	**37,558**	**11,267**	**8,386**	**(2,881)**
71	**Arts, Entertainment, and Recreation**	**5,831**	**1,749**	**792**	**(957)**
72	Accommodation and Food Services	10,872	3,262	2,374	(888)
81	Other Services (except Public Administration)	4,715	1,415	(243)	(1,657)
90	Government	1,726	518	(3,287)	(3,805)
99	Unclassified Industry	680	204	181	(23)
		204,276	**61,283**	**33,456**	**(27,827)**

Source: LightCast 2017, 2025; Computations by authors

J. Projected Job Growth - 2025-2035

Industry job growth projections are obtained through Lightcast, which uses a variety of data sources, including the Bureau of Labor Statistics Quarterly Census of Employment, and are adjusted using wage data and the National Industry-Occupation Employment Matrix (NIOEM). Projections are derived using the last 15 years of historical employment data. Between 2025 and 2035, Miami-Dade County is projected to create 90,230 new jobs (**Table 21**), out of which South Miami-Dade is projected to capture 15.75% of this growth or 14,212 new jobs (**Table 22**).

Table 21: Employer-Based and Self-Employed Job Growth Forecast, Miami-Dade (2025- 2035)

NAICS	Description	2025 Jobs	2035 Jobs	2025 - 2035 Change	2025 - 2035 % Change
11	Agriculture, Forestry, Fishing and Hunting	16,474	18,833	2,358	14%
21	Mining, Quarrying, and Oil and Gas Extraction	609	693	84	14%
22	Utilities	3,161	3,391	230	7%
23	Construction	92,120	101,421	9,301	10%
31	Manufacturing	51,124	53,524	2,400	5%
42	Wholesale Trade	75,757	77,322	1,565	2%
44	Retail Trade	151,844	154,127	2,284	2%
48	Transportation and Warehousing	113,798	123,769	9,971	9%
51	Information	21,940	22,269	328	1%
52	Finance and Insurance	62,169	64,586	2,418	4%
53	Real Estate and Rental and Leasing	48,763	55,296	6,533	13%
54	Professional, Scientific, and Technical Services	120,600	136,305	15,705	13%
55	Management of Companies and Enterprises	12,478	13,324	846	7%

NAICS	Description	2025 Jobs	2035 Jobs	2025 - 2035 Change	2025 - 2035 % Change
56	Administrative and Support and Waste Management and Remediation Services	98,248	100,180	1,933	2%
61	Educational Services	53,912	57,505	3,593	7%
62	Health Care and Social Assistance	195,385	212,408	17,023	9%
71	Arts, Entertainment, and Recreation	25,549	28,031	2,481	10%
72	Accommodation and Food Services	139,816	151,949	12,132	9%
81	Other Services (except Public Administration)	89,411	94,262	4,851	5%
90	Government	150,381	144,254	(6,126)	(4%)
99	Unclassified Industry	1,973	2,291	318	16%
		1,525,512	**1,615,742**	**90,230**	**5.9%**

Source: LightCast 2025, 2035

Table 22: Employer-Based and Self-Employed Job Growth Forecast, South Miami-Dade (2025- 2035)

NAICS	Description	2025 Jobs	2035 Jobs	2025 - 2035 Change	2025 - 2035 % Change
11	Agriculture, Forestry, Fishing and Hunting	10,878	11,574	696	6%
21	Mining, Quarrying, and Oil and Gas Extraction	89	96	7	8%
22	Utilities	1,661	1,771	110	7%
23	Construction	24,698	27,405	2,707	11%
31	Manufacturing	5,578	5,895	317	6%
42	Wholesale Trade	7,986	8,153	167	2%
44	Retail Trade	29,267	29,746	478	2%
48	Transportation and Warehousing	4,683	5,154	470	10%
51	Information	2,807	2,885	77	3%
52	Finance and Insurance	11,094	11,373	280	3%
53	Real Estate and Rental and Leasing	5,077	5,625	548	11%
54	Professional, Scientific, and Technical Services	17,123	19,090	1,966	11%
55	Management of Companies and Enterprises	780	818	38	5%
56	Administrative and Support and Waste Management and Remediation Services	14,892	15,120	228	2%
61	Educational Services	8,452	9,001	549	6%
62	Health Care and Social Assistance	36,339	39,445	3,107	9%
71	Arts, Entertainment, and Recreation	2,887	3,147	261	9%
72	Accommodation and Food Services	17,697	19,186	1,489	8%
81	Other Services (except Public Administration)	20,123	21,455	1,331	7%
90	Government	38,670	37,969	(700)	(2%)
99	Unclassified Industry	397	482	85	21%
		261,178	**275,390**	**14,212**	**5.44%**

Source: LightCast 2025, 2035

K. The Aerospace Industry

Aerospace is part of the manufacturing sector (NAICS 31-33). It includes NAICS codes 332: Fabricated Metal Product Manufacturing and 336: Transportation Equipment Manufacturing. NAICS 336400 - Aerospace Product and Parts Manufacturing is a "national industry" classification comprising establishments primarily engaged in one or more of the following: (1) manufacturing complete aircraft, missiles, or space vehicles; (2) manufacturing aerospace engines, propulsion units, auxiliary equipment or parts; (3) developing and making prototypes of aerospace products; (4) aircraft conversion (i.e., major modifications to systems); and (5) complete aircraft or propulsion systems overhaul and rebuilding (i.e., periodic restoration of aircraft to original design specifications).

Miami-Dade County's aerospace industry is concentrated in three national industry classifications, NAICS 336412 - Aircraft Engine and Engine Parts Manufacturing, NAICS 33613 -Other Aircraft Parts and Auxiliary Equipment Manufacturing, and NAICS 33611 - Aircraft Manufacturing. Each industry has shown job growth since 2017.

Miami-Dade's Aerospace Manufacturing industry has shown significant (161%) job growth since 2017. There are currently 94 aerospace manufacturing establishments employing 2,884 workers (**Table 23**). In South Miami-Dade, there are 13 establishments employing 331 workers (**Table 24**).

Table 23: Miami-Dade Employer Aerospace Product and Part Manufacturing (2025)

6-NAICS	Description	Establishments	Employment	Total Payroll	Average Payroll
336411	Aircraft Manufacturing	20	417	$32,594,260	$78,164
336412	Aircraft Engine and Engine Parts Manufacturing	34	1,629	$151,543,048	$93,028
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing	37	776	$56,745,760	$73,126
336414	Guided Missile and Space Vehicle Manufacturing	2	15	$2,272,676	$151,512
336419	Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing	1	47	$3,480,132	$74,045
		94	**2,884**	**$246,635,876**	

Source: Quarterly Census of Employment and Wages, 2025

Table 24: South Miami-Dade Employer Aerospace Product and Part Manufacturing (2025)

6_NAICS	Description	Establishments	Employment	Total Payroll	Average Payroll
336411	Aircraft Manufacturing	4	146	$9,098,932	$62,321
336412	Aircraft Engine and Engine Parts Manufacturing	3	123	$9,111,304	$74,076
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing	6	62	$5,998,896	$96,756
		13	**331**	**$24,209,132**	

Source: Quarterly Census of Employment and Wages, 2025

Various aerospace and related occupations have significantly grown in both Miami-Dade County and South Miami-Dade between 2017 and 2025 (**Table 25-26**). In Miami-Dade County, occupations with significant growth include Airfield Operations Specialists (1,421), Commercial Pilots (868), Aircraft Mechanics and Service Technicians (679), Industrial Engineers (635), and Airfield Operations Specialists (317). Meanwhile, South Miami-Dade saw the largest increases in Aircraft Mechanics and Service Technicians (274), Engineers, All Other (161), Commercial Pilots (157), Industrial Engineers (153), and Electrical Engineers (145). The rise in technical occupations - including aircraft mechanics, industrial engineers, and electrical engineers - signals a deepening of the region's maintenance, repair, and overhaul (MRO) capabilities as well as broader engineering and manufacturing support functions.

Table 25: Aerospace and Related Occupations Growth Change, Miami-Dade County (2017-2025)

SOC	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Hourly Earnings	Median Hourly Earnings	Median Annual Earnings
17-2011	Aerospace Engineers	352	315	(37)	(11%)	$58.40	$56.98	$118,522.13
17-2071	Electrical Engineers	552	739	187	34%	$52.38	$48.30	$100,465.29
17-2112	Industrial Engineers	869	1,504	635	73%	$51.99	$48.60	$101,085.79
17-2131	Materials Engineers	45	56	11	24%	$51.10	$45.77	$95,201.99
17-2141	Mechanical Engineers	718	861	143	20%	$48.01	$43.28	$90,021.59
17-2199	Engineers, All Other	691	889	197	29%	$51.29	$43.94	$91,388.26
17-3021	Aerospace Engineering and Operations Technologists and Technicians	133	142	8	6%	$35.69	$30.16	$62,735.23
17-3024	Electro-Mechanical and Mechatronics Technologists and Technicians	26	30	4	17%	$35.30	$33.49	$69,662.16
17-3026	Industrial Engineering Technologists and Technicians	179	184	5	3%	$27.55	$24.71	$51,400.49
17-3027	Mechanical Engineering Technologists and Technicians	104	59	(45)	(43%)	$33.72	$33.00	$68,641.70
19-2021	Atmospheric and Space Scientists	104	99	(6)	(6%)	$53.11	$52.40	$108,984.10
19-2032	Materials Scientists	<10	37	Insf. Data	Insf. Data	$48.08	$43.18	$89,804.59
49-2091	Avionics Technicians	435	536	101	23%	$40.30	$39.33	$81,806.34
49-3011	Aircraft Mechanics and Service Technicians	3,822	4,501	679	18%	$39.49	$38.01	$79,058.11
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	129	226	97	75%	$27.18	$27.13	$56,436.48
51-2028	Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	684	513	(171)	(25%)	$18.04	$16.59	$34,501.07
51-2031	Engine and Other Machine Assemblers	24	70	46	187%	$22.32	$23.49	$48,854.10
53-1041	Aircraft Cargo Handling Supervisors	286	294	8	3%	$34.13	$33.39	$69,456.45
53-2011	Airline Pilots, Copilots, and Flight Engineers	2,541	2,259	(282)	(11%)	$140.64	$131.48	$273,475.64
53-2012	Commercial Pilots	984	1,851	868	88%	$74.67	$73.38	$152,634.38
53-2021	Air Traffic Controllers	408	516	108	26%	$74.42	$80.63	$167,713.41
53-2022	Airfield Operations Specialists	200	1,621	1,421	711%	$47.24	$36.78	$76,504.52
53-6032	Aircraft Service Attendants	563	880	317	56%	$20.90	$19.77	$41,126.52

Source: LightCast 2017, 2025

Table 26: Aerospace and Related Occupations Growth Change, South Miami-Dade (2017-2025)

SOC	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Hourly Earnings	Median Hourly Earnings	Median Annual Earnings
17-2011	Aerospace Engineers	50	40	(10)	(19%)	$58.60	$57.20	$118,965.62
17-2071	Electrical Engineers	120	145	25	21%	$52.36	$48.34	$100,555.38
17-2112	Industrial Engineers	116	153	38	33%	$52.00	$48.54	$100,968.98
17-2131	Materials Engineers	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
17-2141	Mechanical Engineers	108	123	14	13%	$48.58	$43.34	$90,140.81
17-2199	Engineers, All Other	136	161	25	19%	$51.07	$43.91	$91,343.08
17-3021	Aerospace Engineering and Operations Technologists and Technicians	13	13	1	5%	$35.83	$30.16	$62,735.71
17-3024	Electro-Mechanical and Mechatronics Technologists and Technicians	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
17-3026	Industrial Engineering Technologists and Technicians	26	20	(6)	(22%)	$27.73	$24.59	$51,144.83
17-3027	Mechanical Engineering Technologists and Technicians	15	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
19-2021	Atmospheric and Space Scientists	17	19	2	14%	$53.24	$52.62	$109,456.36
19-2032	Materials Scientists	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
49-2091	Avionics Technicians	34	41	8	22%	$42.25	$40.73	$84,722.23
49-3011	Aircraft Mechanics and Service Technicians	210	274	65	31%	$40.72	$39.03	$81,190.24
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
51-2028	Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	89	62	(28)	(31%)	$18.11	$16.55	$34,417.77
51-2031	Engine and Other Machine Assemblers	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
53-1041	Aircraft Cargo Handling Supervisors	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
53-2011	Airline Pilots, Copilots, and Flight Engineers	67	91	24	35%	$144.27	$133.24	$277,147.37
53-2012	Commercial Pilots	81	157	76	94%	$75.36	$74.12	$154,166.43
53-2021	Air Traffic Controllers	139	157	18	13%	$74.38	$80.62	$167,699.66
53-2022	Airfield Operations Specialists	13	101	88	689%	$47.32	$36.81	$76,571.21
53-6032	Aircraft Service Attendants	11	41	30	259%	$21.00	$19.82	$41,229.84

Source: LightCast 2017, 2025

In 2024, the Homestead Air Reserve Base (HARB) and surrounds were designated as a "Spaceport Territory" by the Florida Legislature. Currently, only the Cape Canaveral Spaceport (CCS) Launch and Landing Facility, Cecil Spaceport in Jacksonville, and the Space Coast Spaceport in Titusville are FAA licensed. Spaceport is evaluating how the recently designated Homestead Air Reserve Base (HARB) and Tyndall Air Force Base on the Florida Panhandle can be incorporated and best leverage the state spaceport system. Space Florida is focused on maximizing investment, operational efficiency and critical infrastructure challenges.

For South Miami-Dade to take advantage of the HARB Spaceport Territory designation and grow its aerospace industry, foundational capacity-building will need to be strategized. Capacity-building should focus on four areas of opportunity and improvement: land use planning, robust infrastructure and utilities, a skilled workforce, and strong partnerships.

- ***Land use planning*** – land use planning for aerospace manufacturing prioritizes siting facilities near airports and spaceports and logistics hubs with compatible zoning. Key strategies include developing shovel-ready sites. Local governments often use comprehensive plans to zone surrounding land for light or heavy industrial use that supports the aviation industry, such as aviation parts, maintenance, and logistics. South Miami-Dade has a limited amount of industrial land, but there exists a large area of vacant land within the Spaceport Territory owned by Miami-Dade County that already has been targeted for potential aerospace manufacturing. There is also a scattering of commercial land throughout South Miami-Dade that may be suitable for aerospace uses.

- ***Robust infrastructure and utilities*** – aerospace development requires providing robust infrastructure and utilities planning. Site development costs often present public infrastructure challenges especially water and sewer, access roads and the overall surrounding road network. Utilities include electric power, natural gas and municipal water and wastewater. Planning should include high-capacity power for advanced manufacturing, specialized transport, and fiber connectivity.

- ***Skilled workforce*** – growing and locating aerospace manufacturing in a region requires an ample supply of skilled and highly skilled workers. Aerospace manufacturers and their suppliers need locations with a robust talent pool and efficient supply chain network. Aerospace manufacturing's higher salaries and wages rank substantially above the national average and can jump-start economic prosperity for the entire region.

- ***Strong partnerships*** – Building ecosystems for the growth of South Miami-Dade's Aerospace Industry will require cultivating partnerships between private industry and government and extend to academia and research institutions, particularly for training the future workforce. The ecosystem of institutions must include universities, community colleges, and trade schools. Highly efficient public-private partnerships will need to play a key role in ensuring successful outcomes for private investment in Aerospace and government support for critical infrastructure investment.

Appendices

Appendix A: Advanced Industry Employer Establishment Counts and Employment, Miami-Dade (2025)

4-Digit	Description	Establishments	Employment	Total Payroll	Average Payroll
5416	Management, Scientific, and Technical Consulting Services	6,831	22,481	$2,732,945,524	$121,567
5413	Architectural, Engineering, and Related Services	1,733	12,997	$1,227,046,656	$94,410
5415	Computer Systems Design and Related Services	2,541	12,758	$2,067,926,300	$162,089
6215	Medical and Diagnostic Laboratories	277	3,118	$208,092,452	$66,739
3364	Aerospace Product and Parts Manufacturing	94	2,884	$246,635,876	$85,519
5417	Scientific Research and Development Services	477	2,797	$387,781,060	$138,642
2211	Electric Power Generation, Transmission and Distribution	79	2,458	$327,270,092	$133,145
3399	Other Miscellaneous Manufacturing	228	2,288	$123,360,372	$53,916
5182	Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services	361	2,150	$496,854,180	$231,095
3254	Pharmaceutical and Medicine Manufacturing	77	2,147	$164,857,872	$76,785
3391	Medical Equipment and Supplies Manufacturing	169	1,747	$196,914,964	$112,716
3366	Ship and Boat Building	65	1,435	$91,594,632	$63,829
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	71	917	$89,746,156	$97,869
3339	Other General Purpose Machinery Manufacturing	55	505	$32,833,420	$65,017
3363	Motor Vehicle Parts Manufacturing	33	430	$34,826,956	$80,993
3342	Communications Equipment Manufacturing	37	364	$29,821,564	$81,927
3353	Electrical Equipment Manufacturing	19	318	$16,070,312	$50,536
3351	Electric Lighting Equipment Manufacturing	27	261	$15,409,072	$59,039
3362	Motor Vehicle Body and Trailer Manufacturing	18	246	$13,138,752	$53,410
3279	Other Nonmetallic Mineral Product Manufacturing	34	228	$13,834,212	$60,676

Source: Quarterly Census of Employment and Wages, 2025

Appendix B: South Miami-Dade Zip Codes

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Appendix C: Means of Transportation to Work South Miami-Dade (2017-2024)

	Workers 16 years and over	Public transportation	Walked or Biked	Taxicab, motorcycle, or other means	Workers 16 years and over	Public transportation	Walked or Biked	Taxi or ride-hailing ,motorcycle, or other	Public transportation	Walked or Biked	Taxi or ride-hailing ,motorcycle, or other
	2017				**2024**				**% Point Change 2017-2024**		
Town of Cutler Bay	22,195	2.90%	0.80%	1.60%	22,441	1.20%	0.40%	2.40%	-1.7	-0.4	0.8
Florida City	3,910	10.20%	2.60%	5.00%	4,388	4.80%	0.20%	1.30%	-5.4	-2.4	-3.7
Homestead	27,723	6.70%	1.40%	1.60%	37,804	2.10%	1.10%	1.70%	-4.6	-0.3	0.1
Village of Palmetto Bay	11,417	2.60%	0.30%	0.90%	12,353	2.60%	1.10%	3.60%	0	0.8	2.7
Village of Pinecrest village	9,179	6.50%	0.70%	1.30%	8,455	3.00%	1.30%	1.20%	-3.5	0.6	-0.1
Census Designated Places (Unincorporated)											
Country Walk CDP	7,702	1.80%	0.00%	1.30%	10,087	0.70%	0.40%	1.10%	-1.1	0.4	-0.2
Goulds CDP	3,944	4.70%	1.00%	4.70%	6,184	3.30%	2.30%	0.10%	-1.4	1.3	-4.6
Homestead Base CDP	121	14.90%	42.20%	0.00%	141	20.60%	22.70%	0.00%	5.7	-19.5	0
Kendall CDP	38,247	4.00%	1.50%	0.60%	39,445	3.40%	1.60%	1.90%	-0.6	0.1	1.3
Leisure City CDP	10,417	5.20%	0.50%	1.40%	11,756	1.90%	0.40%	2.10%	-3.3	-0.1	0.7
Naranja CDP	3,879	5.60%	0.00%	0.40%	6,914	2.40%	0.30%	1.70%	-3.2	0.3	1.3
Palmetto Estates CDP	7,484	9.00%	1.00%	2.70%	7,510	2.10%	0.00%	2.60%	-6.9	-1	-0.1
Princeton CDP	12,140	3.60%	0.50%	2.10%	20,930	2.80%	0.80%	1.50%	-0.8	0.3	-0.6
Richmond Heights CDP	5,070	13.20%	0.00%	3.20%	4,876	2.80%	0.00%	3.70%	-10.4	0	0.5
Richmond West CDP	18,695	2.30%	0.60%	1.00%	17,441	1.30%	0.30%	1.30%	-1	-0.3	0.3
South Miami Heights CDP	17,709	3.70%	1.10%	2.40%	18,145	1.80%	0.30%	1.20%	-1.9	-0.8	-1.2
The Crossings CDP	11,409	2.00%	0.70%	1.60%	12,090	0.60%	0.30%	1.40%	-1.4	-0.4	-0.2
The Hammocks CDP	30,004	2.60%	1.60%	1.50%	30,005	1.60%	0.50%	2.00%	-1	-1.1	0.5
Three Lakes CDP	8,484	2.20%	0.40%	0.80%	9,172	0.90%	1.20%	1.30%	-1.3	0.8	0.5
West Perrine CDP	4,040	8.00%	0.00%	3.20%	4,864	2.20%	0.30%	7.70%	-5.8	0.3	4.5
South Miami-Dade	**253,769**	**4.26%**	**0.99%**	**1.56%**	**285,001**	**2.13%**	**0.79%**	**1.90%**	**-2.1**	**-0.2**	**0.3**
Miami-Dade County	**1,251,193**	**5.20%**	**2.70%**	**1.40%**	**1,356,445**	**3.30%**	**2.50%**	**2.30%**	**-1.9**	**-0.2**	**0.9**

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

MDC147

Exhibit D

RESOLUTION NO. 2026-43

A RESOLUTION OF THE VILLAGE OF PINECREST, FLORIDA, EXPRESSING SUPPORT FOR THE ECONOMIC DEVELOPMENT COUNCIL OF SOUTH MIAMI-DADE AND ITS 2026 SOUTH MIAMI-DADE COMPETITIVE ASSESSMENT; AUTHORIZING THE VILLAGE MANAGER TO COMMUNICATE THIS SUPPORT TO REGIONAL PARTNERS; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Village of Pinecrest is a charter municipality incorporated in 1996, committed to responsible governance, quality of life, fiscal sustainability, and collaborative regional partnerships in the interest of its residents; and

WHEREAS, the Village of Pinecrest, along with other municipalities in South Miami-Dade County, has been working with and supporting the Economic Development Council of South Miami-Dade for years, in its mission to advocate for and advance quality economic development in the area; and

WHEREAS, the Village of Pinecrest does not have its own economic development department; however, participation with such a group provides Pinecrest with a vested interest in the identification, analysis, and treatment of issues that impact its residents; and

WHEREAS, issues of economic development, along with transportation, the environment, and infrastructure, impact the unincorporated areas as well as the municipalities in the area to various degrees; and

WHEREAS, while each local government may have different ways of addressing these issues as they strive to protect the character of their communities, all agree that a unified approach to examining them and engaging in collaborative discussions on potential solutions is beneficial; and

WHEREAS, the EDC assessment concludes that South Miami-Dade's greatest challenge is no longer dealing with growth—it is now converting that growth into high-wage jobs. The region already has the population, labor force, available land, and designation as a Spaceport region; and

WHEREAS, creating an economic environment that transforms the area from a "bedroom community" serving the broader Miami-Dade County region into an economic employment center in its own right will have a beneficial impact on each of our

Office of the Village Manager

communities, relative to traffic, transportation, affordability, resiliency, and our overall quality of life; and

WHEREAS, success will depend on the coordinated leadership of the local governments in South Dade, as well as continued investment in infrastructure, workforce development, and the aggressive recruitment of aerospace, manufacturing, logistics, and technology employers; and

WHEREAS, the Economic Development Council of South Miami-Dade ("EDC") is a nonprofit organization serving as a connector between business, government, workforce, education, and community stakeholders across South Miami-Dade, providing a platform for strategic collaboration, industry engagement, business advocacy, and economic development implementation; and

WHEREAS, the Village Council finds that the adoption of this Resolution is in the best interests of the Village and its residents.

NOW, THEREFORE, BE IT RESOLVED BY THE VILLAGE COUNCIL OF PINECREST, FLORIDA, AS FOLLOWS:

Section 1. Recitals. The above recitals are true and correct and incorporated as if set forth in full.

Section 2. Support for the EDC and the Competitive Assessment. The Village Council hereby expresses its support for the Economic Development Council of South Miami-Dade and endorses the 2026 South Miami-Dade Competitive Assessment as a substantive, data-driven resource to support regional economic development planning. The Village Council affirms that the EDC's mission, priorities, and implementation agenda reflect shared regional interests that align with the long-term prosperity and quality of life of Pinecrest residents.

Section 3. Regional Collaboration. The Village Council affirms its commitment to continued participation and collaboration with the EDC, neighboring municipalities, Miami-Dade County, educational institutions, workforce agencies, and private-sector partners in support of the coordinated regional leadership called for in the Assessment and encourages the advancement of unified solutions to the region's jobs-to-housing imbalance, infrastructure needs, and workforce development requirements.

Section 4. Authorization to Village Manager. The Village Manager is hereby authorized and directed to transmit a certified copy of this Resolution to the Economic Development Council of South Miami-Dade, Miami-Dade County, and such other regional

Office of the Village Manager
MDC149

partners as the Village Manager deems appropriate, as an expression of the Village's support for the EDC's strategic priorities and commitment to regional economic collaboration.

Section 5. Repeal of Resolutions in Conflict. All resolutions or parts thereof in conflict are hereby repealed to the extent of such conflict.

Section 6. Severability. The provisions of this Resolution are declared to be severable, and if any sentence, section, clause, or phrase of this Resolution shall, for any reason, be held to be invalid or unconstitutional, such decision shall not affect the validity of the remaining sentences, sections, clauses, or phrases of the Resolution, but they shall remain in effect, it being the legislative intent that this Resolution shall stand notwithstanding the invalidity of any part.

Section 7. Effective Date. This Resolution shall take effect immediately upon its adoption.

PASSED and ADOPTED this 14th day of July, 2026.

Joseph M. Corradino, Mayor

Attest:

Priscilla Torres, MMC
Village Clerk

Approved as to Form and Legal Sufficiency:

Mitchell Bierman
Village Attorney

Motion by: Councilmember McDonald
Second by: Vice Mayor Fairman

Vote: Councilmembers Greenberg, McDonald, Meyer, Vice Mayor Fairman and Mayor Corradino voting Yes.

Office of the Village Manager
MDC150

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RESOLUTION NO. 2026-61

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, EXPRESSING SUPPORT FOR THE ECONOMIC DEVELOPMENT COUNCIL OF SOUTH MIAMI-DADE AND ITS 2026 SOUTH MIAMI-DADE COMPETITIVE ASSESSMENT; AUTHORIZING THE VILLAGE MANAGER TO COMMUNICATE THIS SUPPORT TO REGIONAL PARTNERS; PROVIDING FOR AN EFFECTIVE DATE. *(Sponsored by Mayor Karyn Cunningham and Co-Sponsored by Vice Mayor Mark Merwitzer)*

WHEREAS, the Village of Palmetto Bay is a charter municipality incorporated in 2002, committed to responsible governance, quality of life, fiscal sustainability, and collaborative regional partnerships in the interest of its residents; and

WHEREAS, the Economic Development Council of South Miami-Dade ("EDC") is a nonprofit organization serving as a connector between business, government, workforce, education, and community stakeholders across South Miami-Dade, providing a platform for strategic collaboration, industry engagement, business advocacy, and economic development implementation; and

WHEREAS, the Village of Palmetto Bay, along with other South Miami-Dade municipalities, has supported the EDC's mission to advocate for and advance quality economic development throughout the region, recognizing that issues of economic development, transportation, environment, and infrastructure affect both municipalities and unincorporated communities throughout South Miami-Dade; and

WHEREAS, the Village of Palmetto Bay does not maintain a standalone economic development department, and regional participation through the EDC affords the Village a vested stake in the identification, analysis, and treatment of issues that impact its residents and businesses; and

WHEREAS, the EDC, in partnership with Florida International University's Jorge M. Pérez Metropolitan Center, has produced the 2026 South Miami-Dade Competitive Assessment (the "Assessment"), a comprehensive, data-driven analysis of the region's economic strengths,

Docusign Envelope ID: A7C0CF15-6E8F-8D1B-8136-12513BF1E45C

opportunities, and challenges, prepared to guide the next phase of regional economic development strategic planning; and

WHEREAS, the Assessment confirms that South Miami-Dade is entering a critical period of economic transformation, with population growth of 7.3% since 2017 significantly outpacing Miami-Dade County overall (1.3%), and a labor force that has expanded by 13.2% during the same period, with South Miami-Dade's current labor force of 307,637 representing 22.7% of Miami-Dade County's total labor force; and

WHEREAS, the Assessment identifies a persistent and worsening worker spatial mismatch, wherein only 28.87% of employed South Miami-Dade residents—approximately 80,140 workers—are employed within South Miami-Dade, with the remaining 197,358 employed residents commuting daily to jobs elsewhere in Miami-Dade County and beyond, generating chronic traffic congestion on U.S. 1 and the Florida Turnpike, contributing to housing affordability pressures, and diminishing the overall quality of life across the region, including within the Village of Palmetto Bay; and

WHEREAS, the Assessment further identifies aerospace manufacturing as one of the most significant regional economic opportunities, noting that Miami-Dade County's aerospace manufacturing sector has experienced 161% job growth since 2017, and that the 2024 designation of Homestead Air Reserve Base (HARB) and surrounding lands as Florida Spaceport Territories creates a generational platform for attracting aerospace, aviation, advanced manufacturing, maintenance, repair and overhaul, logistics, and defense-support investment to South Miami-Dade; and

WHEREAS, the Assessment establishes that South Miami-Dade's greatest economic challenge is no longer managing population growth—it is converting that growth into high-wage employment; the region already possesses the population base, labor force, land availability, and Spaceport designation necessary to attract major employers, and now requires coordinated leadership, targeted infrastructure investment, workforce development, and aggressive business recruitment to realize this potential; and

Docusign Envelope ID: A7C0CF15-6E8F-8D1B-8136-12513BF1E45C

WHEREAS, the Assessment identifies eight strategic priorities to guide regional action, including: establishing a unified regional economic development coalition; accelerating aerospace and advanced manufacturing development; addressing the jobs-to-residents imbalance; building a future-ready workforce pipeline; investing in strategic infrastructure and site readiness; supporting small business growth and innovation; enhancing regional branding and marketing; and implementing data-driven economic development metrics; and

WHEREAS, transforming South Miami-Dade from a bedroom community serving the rest of Miami-Dade County into a regional employment center in its own right would produce direct and tangible benefits for the Village of Palmetto Bay, including reduced traffic congestion, improved regional transportation, greater housing affordability, enhanced fiscal resilience, and a stronger overall quality of life for Palmetto Bay residents; and

WHEREAS, success in achieving the vision outlined in the Assessment will require sustained coordination and unified leadership among South Miami-Dade local governments, continued public and private investment in infrastructure, workforce development aligned with targeted industry demand, and the disciplined, collaborative, and measurable pursuit of the EDC's strategic implementation agenda; and

WHEREAS, while each municipality may address regional challenges in ways consistent with the character and needs of its own community, all South Miami-Dade local governments share a common interest in collaborative examination of regional economic conditions and engagement in solutions that strengthen the region as a whole; and

WHEREAS, the Village Council finds that the adoption of this Resolution is in the best interests of the Village and its residents.

NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, AS FOLLOWS:

Section 1. Recitals. The above recitals are true and correct and incorporated as if set forth in full.

Docusign Envelope ID: A7C0CF15-6E8F-8D1B-8136-12513BF1E45C

Section 2. Support for the EDC and the Competitive Assessment. The Village Council of the Village of Palmetto Bay hereby expresses its support for the Economic Development Council of South Miami-Dade and endorses the 2026 South Miami-Dade Competitive Assessment as a substantive, data-driven foundation for regional economic development strategic planning. The Village Council affirms that the EDC's mission, priorities, and implementation agenda reflect shared regional interests that align with the long-term prosperity and quality of life of Palmetto Bay residents.

Section 3. Regional Collaboration. The Village Council affirms its commitment to continued participation and collaboration with the EDC, neighboring municipalities, Miami-Dade County, educational institutions, workforce agencies, and private-sector partners in support of the coordinated regional leadership called for in the Assessment, and encourages the advancement of unified solutions to the region's jobs-housing imbalance, infrastructure needs, and workforce development requirements.

Section 4. Authorization to Village Manager. The Village Manager is hereby authorized and directed to transmit a certified copy of this Resolution to the Economic Development Council of South Miami-Dade, Miami-Dade County, and such other regional partners as the Village Manager deems appropriate, as an expression of the Village's support for the EDC's strategic priorities and commitment to regional economic collaboration.

Section 5. Repeal of Resolutions in Conflict. All resolutions or parts thereof in conflict are hereby repealed to the extent of such conflict.

Section 6. Severability. The provisions of this Resolution are declared to be severable, and if any sentence, section, clause, or phrase of this Resolution shall, for any reason, be held to be invalid or unconstitutional, such decision shall not affect the validity of the remaining sentences, sections, clauses, or phrases of the Resolution, but they shall remain in effect, it being the legislative intent that this Resolution shall stand notwithstanding the invalidity of any part.

Section 7. Effective Date. This Resolution shall take effect immediately upon its adoption.

Docusign Envelope ID: A7C0CF15-6E8F-8D1B-8136-12513BF1E45C

PASSED and **ADOPTED** this 6th day of July 2026.

Attest:

Signed by:
Missy Arocha
6EDC211E5E8C48C...

Missy Arocha
Village Clerk

Signed by:
Karyn Cunningham
35B93CD2D0CB470...

Karyn Cunningham
Mayor

APPROVED AS TO FORM AND LEGAL SUFFICIENCY FOR THE SOLE USE AND BENEFIT OF THE VILLAGE:

Signed by:
E22B5568F9FC441...

John J. Quick, Esq.
Village Attorney

FINAL VOTE AT ADOPTION:

Council Member Patrick Fiore	YES
Council Member Steve Cody	YES
Council Member Marsha Matson	YES
Vice-Mayor Mark Merwitzer	YES
Mayor Karyn Cunningham	YES

RESOLUTION NO. 26-51

A RESOLUTION OF THE MAYOR AND TOWN COUNCIL OF THE TOWN OF CUTLER BAY, FLORIDA, ENDORSING THE 2026 SOUTH MIAMI-DADE COUNTY COMPETITIVE ASSESMENT STUDY PREPARED BY THE FLORIDA INTERNATIONAL UNIVERSITY (FIU) JORGE M. PEREZ METROPOLITAN CENTER FOR THE ECONOMIC DEVELOPMENT COUNCIL (EDC) OF SOUTH MIAMI-DADE COUNTY; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, in 2025, the Economic Development Council ("EDC") of South Miami-Dade County engaged the services of the Florida International University (FIU) Jorge M. Perez Metropolitan Center to prepare a 2026 Competitive Assessment Study ("Study") for South Miami-Dade County" ("Study Area") to determine the region's economic strength, opportunities, and challenges to be addressed in the EDC's 2026 Economic Development Strategic Plan for the study area; and

WHEREAS, the Study is the first of two documents that will provide an update to the EDC of South Miami Dade's 2020 Strategic Economic Development Plan for the Study Area; and

WHEREAS, the main objectives of the Study include identifying potential economic drivers, policies, and strategies that will attract private investment and enable business growth, job creation, increased tax revenues, and expanded economic opportunities for businesses and residents of the Study Area; and

WHEREAS, the Study findings show that the Study Area has significant economic potential given the substantial growth in its worker-age population over the last two decades, the presence of key advanced industry sectors, including aerospace manufacturing, and the recent designation of the Homestead Air Reserve Base, and its surrounds, as Spaceport Territories; and

WHEREAS, the Study Area currently has 14,761 employer establishments that employ 152,039 workers; and

WHEREAS, the Study Area's leading industry sectors include Health Care (2,436 establishments) Professional, Scientific and Technical Services (2,133 establishments), and Construction (1,542 establishments); and

WHEREAS, there are 1,214 advanced industry establishments in the Study Area that employ 6,588 workers, with the three leading advanced industry sectors being Management/Scientific/Technical Consulting Services (528), Architectural, Engineering (243), and Computer Systems Design and Related Services (230); and

WHEREAS, effective July 1, 2024, the Homestead Air Reserve Base and Miami-Dade County-owned land north of the base, were designated as official "Florida Spaceport Territories" to foster aerospace research, manufacturing, and development, with the intent of the designation being to establish an aerospace hub that creates an ecosystem for companies to be centralized in one area with access to resources, shared ideas, a talented workforce, premium locations, and capital, while providing economic incentives for aerospace companies to locate in the Study Area; and

WHEREAS, the Town desires to endorse the Study which supports the Strategic Economic Development Plan for the Study Area; and

WHEREAS, the Town Council finds that this Resolution is in the best interest and welfare of the residents of the Town.

NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND TOWN COUNCIL OF THE TOWN OF CUTLER BAY, FLORIDA, AS FOLLOWS:

Section 1. **Recitals.** The above recitals are true and correct and are incorporated herein by this reference.

Section 2. **Endorsement.** The Town Council fully endorses the Study prepared by the Florida International University (FIU) Jorge M. Perez Metropolitan Center for the EDC of South Miami-Dade.

Section 3. **Effective Date.** This Resolution shall take effect immediately upon enactment.

PASSED AND ADOPTED this 15th day of July 2026.

TIM MEERBOTT
Mayor

Attested and Rendered July 16, 2026:

MAURICIO MELINU, CMC
Town Clerk

APPROVED AS TO FORM AND
LEGAL SUFFICIENCY FOR THE
SOLE USE OF THE TOWN OF CUTLER BAY:



WEISS SEROTA HELFMAN
COLE & BIERMAN, P.L.
Town Attorney

Moved By: Councilmember Lord
Seconded By: Councilmember Duncan

FINAL VOTE AT ADOPTION:

Mayor Tim Meerbott	YES
Vice Mayor Michael P. Callahan	ABSENT
Councilmember Robert “BJ” Duncan	YES
Councilmember Suzy Lord	YES
Councilmember Richard M. Ramirez	YES

CITY OF HOMESTEAD, FLORIDA

RESOLUTION NO. R2026-07-118

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF HOMESTEAD, FLORIDA, **EXPRESSING SUPPORT FOR THE ECONOMIC DEVELOPMENT COUNCIL OF SOUTH MIAMI-DADE AND ITS 2026 SOUTH MIAMI-DADE COMPETITIVE ASSESSMENT;** PROVIDING FOR TRANSMITTAL; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the City of Homestead is a municipal corporation of the State of Florida committed to responsible governance, quality of life, fiscal sustainability, and collaborative regional partnerships in the interest of its residents; and

WHEREAS, the Economic Development Council of South Miami-Dade ("EDC") is a nonprofit organization serving as a connector between business, government, workforce, education, and community stakeholders across South Miami-Dade, providing a platform for strategic collaboration, industry engagement, business advocacy, and economic development implementation; and

WHEREAS, the City of Homestead, along with other South Miami-Dade municipalities, has supported the EDC's mission to advocate for and advance quality economic development throughout the region, recognizing that issues of economic development, transportation, environment, and infrastructure affect both municipalities and unincorporated communities throughout South Miami-Dade; and

WHEREAS, the City of Homestead recognizes that regional participation through the EDC affords the City a vested stake in the identification, analysis, and treatment of issues that impact its residents, businesses, workforce, and long-term economic position within South Miami-Dade; and

WHEREAS, the EDC, in partnership with Florida International University's Jorge M. Pérez Metropolitan Center, has produced the 2026 South Miami-Dade Competitive Assessment, a comprehensive, data-driven analysis of the region's economic strengths, opportunities, and challenges, prepared to guide the next phase of regional economic development strategic planning; and

WHEREAS, the Assessment confirms that South Miami-Dade is entering a critical period of economic transformation, with population growth of 7.3% since 2017 significantly outpacing Miami-Dade County overall at 1.3%, and a labor force that has expanded by 13.2% during the same period, with South Miami-Dade's current labor force of 307,637 representing 22.7% of Miami-Dade County's total labor force; and

WHEREAS, the Assessment identifies a persistent and worsening worker spatial mismatch, wherein only 28.87% of employed South Miami-Dade residents, approximately 80,140 workers, are employed within South Miami-Dade, with the remaining 197,358 employed residents commuting daily to jobs elsewhere in Miami-Dade County and beyond, generating chronic traffic congestion on U.S. 1 and the Florida Turnpike, contributing to housing affordability pressures, and diminishing the overall quality of life across the region, including within the City of Homestead; and

WHEREAS, the Assessment further identifies aerospace manufacturing as one of the most significant regional economic opportunities, noting that Miami-Dade County's aerospace manufacturing sector has experienced 161% job growth since 2017, and that the 2024 designation of Homestead Air Reserve Base and surrounding lands as Florida Spaceport Territories creates a generational platform for attracting aerospace, aviation,

advanced manufacturing, maintenance, repair and overhaul, logistics, and defense-support investment to South Miami-Dade; and

WHEREAS, the Assessment establishes that South Miami-Dade's greatest economic challenge is no longer managing population growth, but rather converting that growth into high-wage employment, as the region already possesses the population base, labor force, land availability, and Spaceport designation necessary to attract major employers, and now requires coordinated leadership, targeted infrastructure investment, workforce development, and aggressive business recruitment to realize this potential; and

WHEREAS, the Assessment identifies eight strategic priorities to guide regional action, including establishing a unified regional economic development coalition; accelerating aerospace and advanced manufacturing development; addressing the jobs-to-residents imbalance; building a future-ready workforce pipeline; investing in strategic infrastructure and site readiness; supporting small business growth and innovation; enhancing regional branding and marketing; and implementing data-driven economic development metrics; and

WHEREAS, transforming South Miami-Dade from a bedroom community serving the rest of Miami-Dade County into a regional employment center in its own right would produce direct and tangible benefits for the City of Homestead, including reduced traffic congestion, improved regional transportation, greater housing affordability, enhanced fiscal resilience, expanded employment opportunities, and a stronger overall quality of life for Homestead residents; and

WHEREAS, success in achieving the vision outlined in the Assessment will require sustained coordination and unified leadership among South Miami-Dade local

governments, continued public and private investment in infrastructure, workforce development aligned with targeted industry demand, and the disciplined, collaborative, and measurable pursuit of the EDC's strategic implementation agenda; and

WHEREAS, while each municipality may address regional challenges in ways consistent with the character and needs of its own community, all South Miami-Dade local governments share a common interest in collaborative examination of regional economic conditions and engagement in solutions that strengthen the region as a whole; and

WHEREAS, the City Council finds that adoption of this Resolution is in the best interests of the City of Homestead and its residents.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF HOMESTEAD, FLORIDA:

Section 1. **Recitals Adopted**. The foregoing recitals are confirmed and incorporated herein.

Section 2. **Support for the EDC and the Competitive Assessment**. The City Council of the City of Homestead hereby expresses its support for the Economic Development Council of South Miami-Dade and endorses the 2026 South Miami-Dade Competitive Assessment as a substantive, data-driven foundation for regional economic development strategic planning. The City Council affirms that the EDC's mission, priorities, and implementation agenda reflect shared regional interests that align with the long-term prosperity and quality of life of Homestead residents.

Section 3. **Regional Collaboration**. The City Council affirms its commitment to continued participation and collaboration with the EDC, neighboring municipalities,

Miami-Dade County, educational institutions, workforce agencies, and private-sector partners in support of the coordinated regional leadership called for in the Assessment, and encourages the advancement of unified solutions to the region's jobs-housing imbalance, infrastructure needs, and workforce development requirements.

Section 4. **Transmittal**. The City Clerk is hereby authorized and directed to transmit a certified copy of this Resolution to the Economic Development Council of South Miami-Dade, Miami-Dade County, and municipalities of South Miami-Dade County, as an expression of the City's support for the EDC's strategic priorities and commitment to regional economic collaboration.

Section 5. **Effective Date**. This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED THIS 22nd day of July, 2026.

STEVEN D. LOSNER
Mayor

SPONSORED BY: MAYOR STEVEN D. LOSNER

ATTEST:

ELIZABETH SEWELL, MPA, MMC
City Clerk

APPROVED AS TO FORM AND LEGAL SUFFICIENCY
FOR THE USE AND BENEFIT OF THE CITY ONLY:

WEISS SEROTA HELFMAN COLE & BIERMAN, P.L.
City Attorney

Moved by:	Vice Mayor Jenifer N. Bailey
Seconded by:	Councilman Sean L. Fletcher
Council Vote:	7-0

FINAL VOTE AT ADOPTION

Mayor Steven D. Losner	*YES*
Vice Mayor Jenifer N. Bailey	*YES*
Councilwoman Erica G. Ávila	*YES*
Councilman Clemente Canabal	*YES*
Councilman Sean L. Fletcher	*YES*
Councilwoman Kimberly Konsky	*YES*
Councilman Larry Roth	*YES*

CERTIFIED COPY
City of Homestead
CITY CLERK
DATE: 7/28/2026
Incorporated 1913

RESOLUTION NO: 26-56

A RESOLUTION OF THE MAYOR AND CITY COMMISSION OF THE CITY OF FLORIDA CITY, FLORIDA, EXPRESSING SUPPORT FOR THE ECONOMIC DEVELOPMENT COUNCIL OF SOUTH MIAMI-DADE AND ITS 2026 SOUTH MIAMI-DADE COMPETITIVE ASSESSMENT; AFFIRMING THE CITY'S COMMITMENT TO REGIONAL ECONOMIC DEVELOPMENT, JOB CREATION, INFRASTRUCTURE INVESTMENT, AND WORKFORCE DEVELOPMENT; AUTHORIZING THE CITY MANAGER TO COMMUNICATE THIS SUPPORT TO REGIONAL PARTNERS; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the City of Florida City is a municipal corporation of the State of Florida committed to promoting economic opportunity, enhancing quality of life, expanding employment opportunities, and fostering sustainable growth for its residents and businesses; and

WHEREAS, the Economic Development Council of South Miami-Dade ("EDC") serves as a regional organization dedicated to advancing economic development, business attraction, workforce development, infrastructure investment, and strategic planning throughout South Miami-Dade County; and

WHEREAS, the City recognizes that economic development, transportation, housing affordability, workforce readiness, infrastructure investment, and business recruitment are regional issues that transcend municipal boundaries and require coordinated action among local governments and stakeholders; and

WHEREAS, the EDC, in partnership with Florida International University's Jorge M. Pérez Metropolitan Center, has prepared the 2026 South Miami-Dade Competitive Assessment (the "Assessment"), providing a comprehensive and data-driven evaluation of the region's economic conditions, opportunities, and challenges; and

WHEREAS, the Assessment identifies significant opportunities for economic growth in South Miami-Dade, including aerospace, aviation, logistics, advanced manufacturing, transportation, warehousing, defense-support industries, technology, and related sectors; and

WHEREAS, the City of Florida City is uniquely positioned to benefit from regional economic growth initiatives due to its strategic location within South Miami-Dade County, proximity to major transportation corridors, available development opportunities, and access to regional workforce assets; and

WHEREAS, the City recognizes the importance of creating additional high-quality employment opportunities within South Miami-Dade in order to reduce commuting burdens, improve mobility, enhance economic prosperity, and strengthen the overall quality of life for residents; and

WHEREAS, the Assessment identifies strategic priorities that include strengthening regional economic collaboration, expanding workforce development initiatives, investing in infrastructure and site readiness, supporting small business growth, attracting targeted industries, and promoting data-driven economic development practices; and

RESOLUTION NO: 26-56

WHEREAS, the City Commission finds that supporting regional economic development initiatives and collaborating with neighboring municipalities, educational institutions, workforce organizations, Miami-Dade County, and private-sector partners serves a valid public purpose and is in the best interests of the residents and businesses of Florida City; and

WHEREAS, the City Commission desires to express its support for the EDC and the continued implementation of strategies designed to strengthen South Miami-Dade's economic competitiveness.

NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND CITY COMMISSION OF THE CITY OF FLORIDA CITY, FLORIDA:

Section 1. Recitals.

The foregoing recitals are true and correct and are incorporated herein by reference.

Section 2. Support for the Economic Development Council and Competitive Assessment.

The City Commission hereby expresses its support for the Economic Development Council of South Miami-Dade and recognizes the 2026 South Miami-Dade Competitive Assessment as a valuable resource for understanding regional economic conditions and informing future economic development efforts throughout South Miami-Dade County.

Section 3. Commitment to Regional Collaboration.

The City Commission affirms its commitment to continued collaboration with the EDC, Miami-Dade County, neighboring municipalities, educational institutions, workforce development organizations, business leaders, and other stakeholders to promote sustainable economic growth, job creation, infrastructure investment, and workforce development opportunities throughout the region.

Section 4. Authorization.

The City Manager is hereby authorized and directed to transmit a certified copy of this Resolution to the Economic Development Council of South Miami-Dade and such other governmental, educational, and economic development partners as deemed appropriate.

RESOLUTION NO: 26-56

Section 5. Effective Date. This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED by the Mayor and the City Commission of the City of Florida City, Florida, this 14th day of July, 2026.

CHARLOTTE THOMPSON, Mayor

ATTEST:

JENNIFER A. EVELYN, CITY CLERK

Approved as to form and legal sufficiency:

REGINE MONESTIME, CITY ATTORNEY

Offered By: Mayor
Motion to adopt by Vice Mayor Cobb seconded by Comm. Brown

FINAL VOTE AT ADOPTION

Mayor Charlotte Thompson	Y
Vice Mayor Ronda Cobb	Y
Commissioner James Gold	Y
Commissioner Richard Brown, Jr.	Y
Commissioner Trina Wilborn	Y

STATE OF FLORIDA
COUNTY OF MIAMI-DADE

I, Jennifer A. Evelyn City Clerk
Of the City of Florida City, Florida do hereby certify that the above and foregoing is a true and correct copy of the original thereof on file in this office.
WITNESS, my hand and the seal of said City
this 17th day of August AD 20 26

By:

Office of the College President
300 N.E. Second Avenue
Miami, Florida 33132-2297

Miami Dade College

Madeline Pumariega
College President
Phone: (305) 237-3221
Fax: (305) 237-3105
Email: mpumarie@mdc.edu

October 29, 2026

The Honorable Daniella Levine Cava
Mayor, Miami-Dade County
The Honorable Members of the Board of County Commissioners
Miami-Dade County
Stephen P. Clark Center
111 NW 1st Street
Miami, FL 33128

Dear Mayor Levine Cava and Members of the Board of County Commissioners:

I am pleased to share Miami Dade College's strong support for the Miami-Dade County Spaceport Territory and the opportunity to position South Miami-Dade as a hub for aerospace, aviation, defense, advanced manufacturing, and innovation.

This initiative is about more than attracting new industries. It is about creating good-paying jobs, strengthening our local economy, and opening doors for South Dade families to participate in the industries shaping our future.
At Miami Dade College, we see firsthand the difference that education and access to opportunity can make in people's lives. For decades, our Homestead Campus has helped generations of South Dade residents gain the skills and education needed to build successful careers. We have an opportunity to build on that foundation and connect our community to a rapidly growing industry.

Through our Florida Center for Aviation and Aerospace and Eig-Watson School of Aviation, MDC is already preparing students for careers across the aviation and aerospace sectors. Our programs span professional pilot training, aviation maintenance, aerospace technology, aviation administration, and transportation and logistics, with stackable credentials that allow students to enter the workforce and continue advancing their education. Through industry partnerships, apprenticeships, and hands-on training using flight simulators and emerging technologies, we are building the talent pipeline these industries need.

The Spaceport Territory creates an opportunity to expand this work in partnership with Miami-Dade County, Space Florida, and employers, aligning education and workforce training with new investment and job creation. Our Homestead Campus can play an important role in ensuring that students, working adults, and families throughout South Dade have direct access to these opportunities.

As the County moves forward with infrastructure, site readiness, and attracting industry investment, MDC stands ready to be a partner. We share a commitment to making sure this initiative delivers lasting economic benefits and meaningful career opportunities for the people of South Miami-Dade.

We look forward to working together to bring this vision to life and help shape the future of our region.

Sincerely,

Madeline Pumariega