

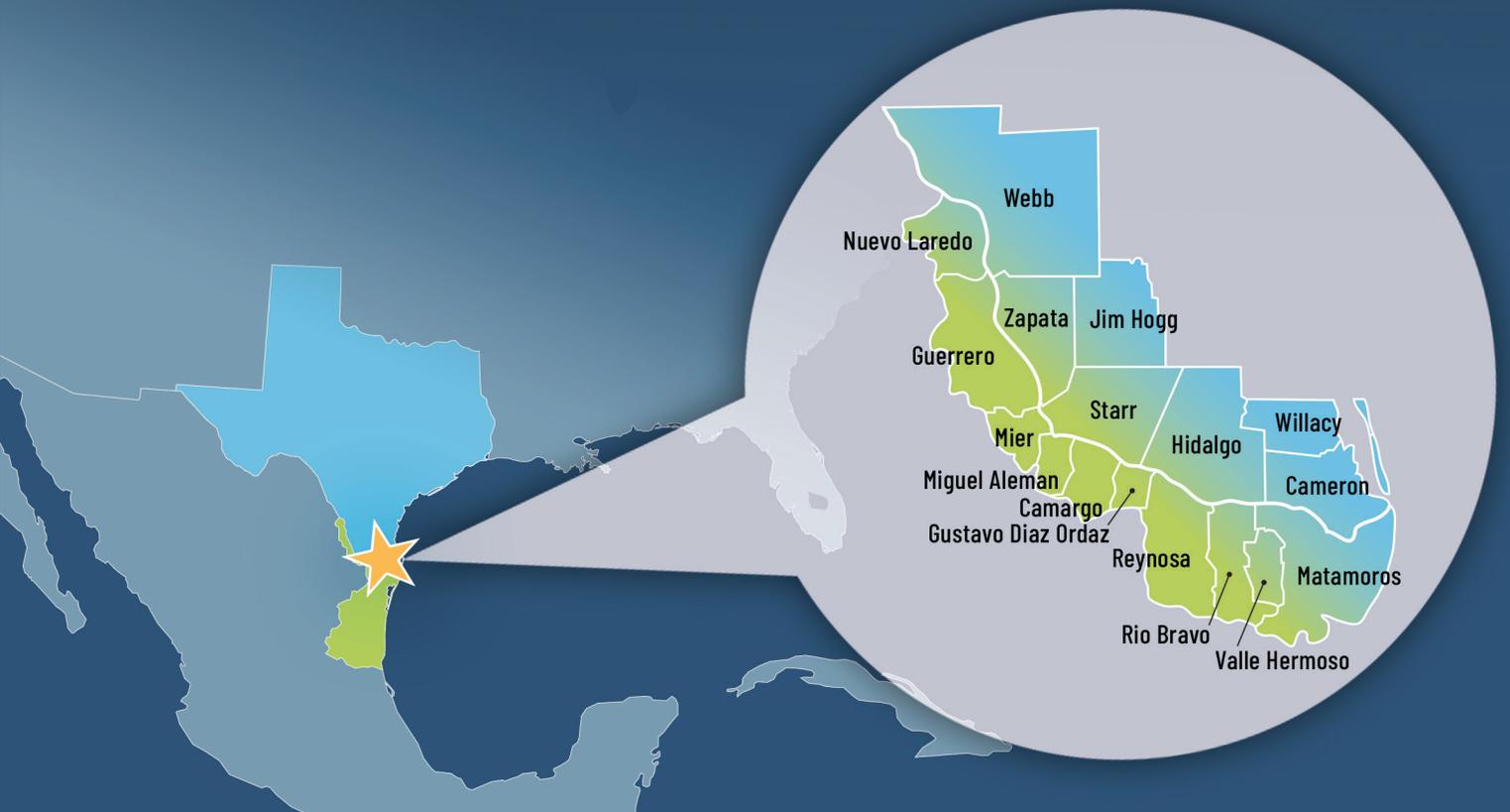


RISE OF THE REGION

2025

Economic Development Assessment

Facilitated & Compiled by
Marketing Alliance and Shortlisted





RISE OF THE REGION

An Economic Development Assessment of Rio South Texas, including the counties of Cameron, Hidalgo, Jim Hogg, Starr, Webb, Willacy and Zapata in the United States and the municipios of Camargo, Guerrero, Gustavo Diaz Ordaz, Matamoros, Mier, Miguel Aleman, Nuevo Laredo, Reynosa, Rio Bravo, and Valle Hermoso in the State of Tamaulipas in Mexico. This document has been created to capture data and discoveries to better position the region for long-term economic prosperity.

ACKNOWLEDGMENTS

Marketing Alliance and Shortlisted would like to thank the following individuals and organizations for their participation in this planning process:

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EXECUTIVE SUMMARY

Introduction

Right now, there is the unique opportunity to amplify the collaboration between the United States and Mexico, to create a bold value proposition for business opportunity, unlike any other place in the world. This assessment document begins to identify the needs, priorities, assets and organizations in this dynamic, binational region to enable exponential prosperity. Like the spirit of the people within the region, the new day for economic development is here and teeming with potential.

Led by COSTEP, this study is a result of the interest to bolster the success of regional economic development efforts through understanding and discovery. By uncovering data related to the regional population, workforce talent, education/training offerings, business predominance and partner organizations, a refined approach to regional economic development can be created.

To achieve significant results in growing the economy, strengths must be leveraged and weaknesses have to be overcome. This region is unlike any other, and holds significant advantages for businesses because of its strategic binational location. In addition to the location, a young and growing workforce will be the main catalyst for long-term success if education/training partners are committed, and resources are in place, to educate, train and inspire future leaders and workers.

Through data gathering and stakeholder interviews, the primary industries identified for growth in the 7-county region include Trade, Transportation and Utilities; Natural Resources and Mining; Education and Health Services; Leisure and Tourism; Professional and Business Services and Manufacturing. Available talent and physical assets that include the largest inland port in the United States, traditional water ports, a robust highway/interstate system, international crossings, airports, and a spaceport drive business opportunity between the United States, Mexico, and places across the world because of significant connectivity advantages.

Developing a regional approach to serve a vast geography within the United States, Mexico and collectively can be a significant challenge due to the physical distance between economic development entities. Add to this a lack of historical collaboration between individual counties, cities and jurisdictions, and the ability to align efforts is further hindered. At times, competing priorities and interests will challenge a regional approach, so mutually-beneficial initiatives must be discovered.

It's important to focus on where the greatest impact can be made, and determine the path forward, with information included in this assessment document.

A regional approach to economic development can only be successful if it is supported predominantly by the private business sector, with secondary partners in government, education/training, economic development, and Chambers of Commerce. Through our discoveries, we believe a new organization, or the evolution of an existing organization, can deliver a value proposition that will resonate with leaders throughout the region, garnering financial and strategic support. To do so, it must be bold, progressive and capitalize on immediate, significant opportunities. With an understanding that economic impact supersedes geography, two frameworks will be presented for consideration to successfully implement this regional strategy.

Frameworks to be considered vary in mission, investors, geography served and services/resources offered, and should be validated through an organizational discovery and alignment plan. The leadership at COSTEP should act in a support role to enable a new or enhanced organization through funding, strategy, connections, advocacy, education and administrative responsibilities.



Frameworks

Though not presented to be final organizational development strategies, it's of benefit to review this economic development assessment with the following frameworks in mind. They have been crafted as a result of the information gathering phase of the Rise of the Region 2025 initiative, and will be validated through the organizational assessment and membership recruitment initiatives. These proposed frameworks define two possible organization types, with a brief description of geographies served, service/resource offerings, and investor composition.

<p>Framework A</p> <ul style="list-style-type: none"> • Prioritize Business Development Services to the four counties of Webb, Starr, Hidalgo, and Cameron and strategically aligned municipios • Provide Data, Administrative Support and Education to the three counties of Zapata, Jim Hogg, and Willacy • Focus efforts/budget on International Recruitment and Investment • Lead National Marketing Campaign • Recruit investors consisting of private business leaders in Texas counties and 10 municipios 	<p>Framework B</p> <ul style="list-style-type: none"> • Prioritize Business Development Services to the three counties of Webb, Hidalgo, and Cameron and strategically aligned municipios • Provide Data, Administrative Support and Education to the four counties of Starr, Zapata, Jim Hogg, and Willacy • Focus efforts/budget on International Recruitment and Investment • Lead National Marketing Campaign • Recruit investors consisting of private business leaders in Texas counties and 10 municipios 	<p><i>Facilitate the following:</i></p> <ul style="list-style-type: none"> • New communication pathways in region and between regions • Talent pipeline development through coordination with higher education partners and training facilities • Domestic recruitment hand-offs to economic development partners • Placemaking efforts with local jurisdictions • Resource identification and promotion for innovation industry and entrepreneurs
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A Unique Time in Our History

This economic assessment document has been created during the global COVID-19 pandemic and because of restrictions, did not allow for the research team to physically spend time in the region to directly interface with leaders and personally experience the assets of this unique place. New forms of exploration, including virtual tours of the region, took place using technology to allow the research team to better understand the study area. A comprehensive survey, phone calls, and video conferences were tools used to discover information to complement the government-sourced data used in this study. Because of this, this document will be updated as restrictions lift and access to the region becomes available.

How to Read this Document

This economic assessment document offers an evaluation of the economic opportunities and challenges of the seven county region of Rio South Texas, including the counties of Cameron, Hidalgo, Jim Hogg, Starr, Webb, Willacy and Zapata in the United States. Where data sets were available, and perspectives were offered, discoveries related to the municipios of Camargo, Guerrero, Gustavo Diaz Ordaz, Matamoros, Mier, Miguel Aleman, Nuevo Laredo, Reynosa, Rio Bravo, and Valle Hermoso in the State of Tamaulipas in Mexico are presented. Surveys were presented in English and Spanish options, and phone calls were held with leaders in both countries, to allow for a binational perspective that will benefit future regional efforts.

Information presented within this document has been researched and presented through quantitative analysis, consideration of economic development best practices, and qualitative input from stakeholders in the region, including leaders in private business, education, government, economic development and the resident population. It defines the assets and priorities of the region to better make decisions on how to grow the economy through a regional approach to economic development.



This assessment is a tool among many documents prepared to benefit the economic development ecosystem, and should be used in complementary fashion to other studies of relevance. While this assessment highlights individual counties, municipios and business centers, its context is one from a regional perspective and should be used with this frame of reference. This assessment is United States-centric by design, but recognizes that collaboration between the United States and Mexico will lead to combined success.

By creating this document, we are providing an actionable snapshot in a moment in time. Economic conditions will change and evolve, and strategies resulting from discoveries in this document should be fluid as needed. This economic assessment document should not be seen as a static document, but as one that can grow as economic conditions change and new market/business opportunities occur.

Summary of Select Research Discoveries

Collaboration isn't occurring to the degree necessary to be highly effective. Like many regions in the United States, communication between organizations in the economic development ecosystem isn't occurring at the level needed to advance individual and group success. Add to this challenge the binational nature of the region, and there are significant shortcomings revealed. With proper resources, collaboration should be pursued between the United States and Mexico as this binational advantage is a significant growth opportunity for the region.

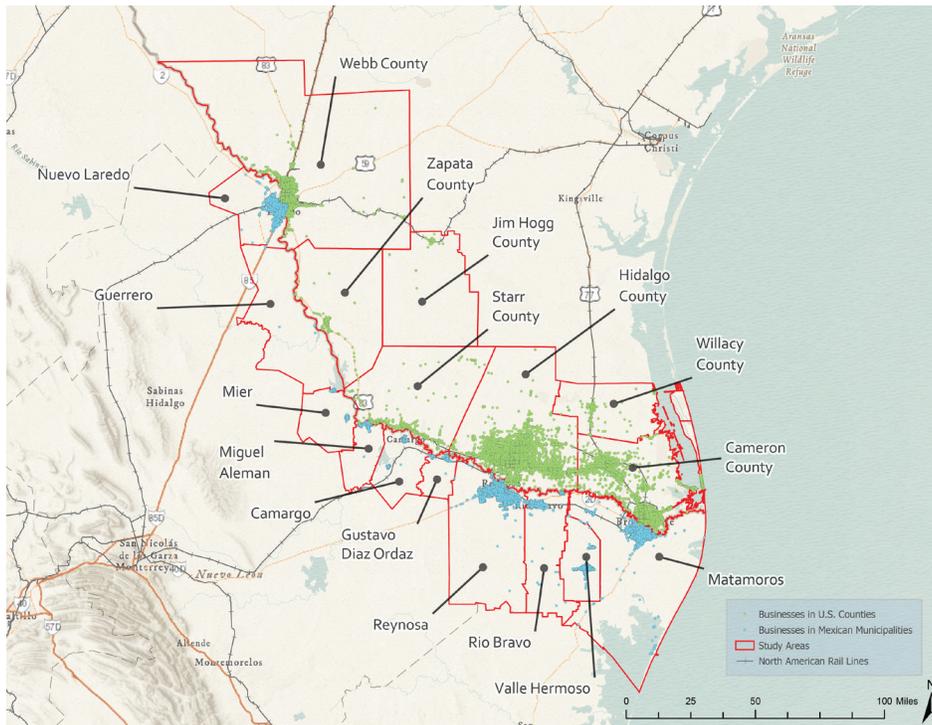
A progressive, untraditional regional organization is needed, but will require financial support. It's clear that a regional economic development organization focused on leveraging the complementary strengths of Texas and Mexico is needed. Additional services such as support for rural areas, entrepreneurs, data, and domestic recruitment could be phased in with a deliberate and intentional time frame. Private business should lead this effort and make up the majority of the Board of Directors, with non-voting partners in government, education/training, and the economic development ecosystem rounding out the organization's leadership. No public funding mechanism is in place at this time, so it is imperative to have a value proposition that is incredibly attractive to private businesses in Texas and Mexico to seek financial support.

This region is entirely unique and should be treated as such. Being a binational region, the strategic advantages here are unlike any other region in the United States. Untraditional, unique solutions must be pursued. With this strategic advantage also comes challenges, with the unpredictability of two governments, legislative priority changes, evolving trade agreements, and other such concerns that can arise between countries. From interviews with stakeholders on both sides of the border, we recognize a willingness to collaborate if the opportunity is of complementary benefit and substance.

Qualitative discovery has revealed something very unique to other places in the world. Through stakeholder interviews and survey response, a common theme occurred that is important to share. The leaders of this region are passionate about economic development and advancing the region through servant-leadership themes that have been offered multiple times. A certain grit, determination and "can-do" spirit continually reveals itself on both sides of the border. This energy, call it innovation or work ethic or a "culture of yes" is a powerful force of transformation in the future of prosperity creation in the binational region. To capitalize on this, new ways to collaborate, share and communicate must be pursued.



Business Locations in the Study Area



ESRI 2019 and DENUE 2019

Of the 7-county Rio South Texas region, 94% of the businesses and talent is in 3 of the counties. While this study has been framed to understand the needs and opportunities of the 7-county region, it should be recognized that the predominance of business and talent resides in 3 of the 7 counties in the study area. The focus, and resulting solutions provided to these 3 counties should be very different than the remaining 4 counties. (Starr is unique as it borders Mexico and has unique growth potential.) Maturity of economic development organizations in these 3 counties is strong, with less sophistication and/or lack of presence in other less-populated counties/jurisdictions. Education, events, resources and specific support offerings should be created for rural communities to be relevant in a regional effort.

Two countries, working together in complimentary efforts, could deliver exponential growth. There's a fascinating interplay happening between the United States and Mexico at the regional level, driven by state entities, local organizations and private business leaders. Whether it's Brownsville and Matamoros, McAllen and Reynosa, Laredo and Nuevo Laredo, or the communities in between, a synergy is happening that leverages each country's talent base, business clusters, education/training offerings, promotional budgets, distribution networks, and quality of life features. Through conversations with stakeholders and survey responses, it has been discovered that collaboration between economic development organizations and private industry is happening, but can be amplified further. Groups such as the Matamoros Economic Development Committee, the Binational Council for the Economic Development of Reynosa, and Comité de Desarrollo Económico e Industrial de Nuevo Laredo should be looked at for strategic development, partnership and alignment of regional strategies.

The United States and Mexico relationship can be further strengthened and leveraged through renewed collaboration on business-driven needs of the region (talent development, placemaking, customer/supplier introductions). With a proper membership structure and budget, a regional organization can deliver upon this collaborative effort. To do so, this organization must be private-business dominant to allow for peer-to-peer conversations with the most successful organizations in Mexico, currently driven by business leaders.



SWOT ANALYSIS

Assessing the region's strengths and weaknesses as well as its opportunities and threats provide context to make business development, talent development, and infrastructure decisions. The SWOT summarized below is based on both stakeholder input and quantitative analysis. A typical SWOT analysis defines attributes during a single moment in time, though it should be understood that they often reflect longer-term issues of economic opportunity and competitiveness. This analysis is presented to advance business development efforts in the United States by leveraging the assets of the combined region.

Strengths

- Strategic geographic location between two countries, leveraging talent, customers and trade agreements
- Young workforce that is growing significantly
- Land ports (including the busiest) and sea ports that enable commerce
- Available, low cost, unskilled workforce in the United States
- Available, unskilled to middle-skilled workforce in Mexican municipios
- Low cost of living
- Synergistic manufacturing cluster/process between countries
- Available land and open spaces for development
- Business-friendly environment
- No winter season
- Educational infrastructure including UTRGV/STC/TSTC/TSC/ Laredo College/Texas A&M
- Five modes of connectivity: road, railroad, air, sea and space
- Vast natural setting with outdoor amenities
- Competitive state incentives and Foreign Trade Zone benefits

Weaknesses

- Limited collaboration among economic development partners
- Industry mix is not significantly diversified
- Talent mix is not significantly diversified
- Inconsistent availability of skilled labor in parts of region
- Business and talent clusters are located heavily in 3 of 7 counties
- Limited number of major employers on U.S. side of region
- Access to funding is inconsistent
- Distance to customers and talent is far for parts of the region
- No defined "brand" to promote nationally and internationally
- Minimal public transit in areas
- Inconsistent support for entrepreneurial culture
- Unpredictable congestion on bridge crossings
- Local legislative environments are challenging
- Downtowns and physical spaces lack certain amenities to attract and keep young workers
- No clear lead on regional initiatives
- Limited long-term earning potential for advanced degree professionals
- EDOs not managing prospects with maximum effectiveness

Opportunities

- There's a renewed interest to align economic development efforts in the region
- Private business can be further engaged in economic development
- Increase collaboration between United States and Mexico
- Pivot towards more business expansion of key industries
- Provide more entrepreneurial support
- National and international marketing campaign to promote region for opportunity
- Further education/training program options to fill shortage of technical and trade skills
- Develop new retail and tourism strategies to draw more people across border
- Continue to address crime and perceptions of crime
- Establish microgrant program for rural communities
- Leverage new onshoring mandates for manufacturing
- Create revenue for a regional organization with services and data offered to economic development partners

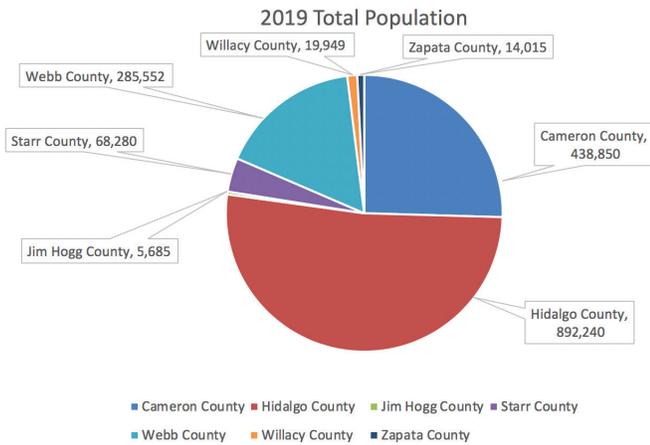
Threats

- Historic competition between jurisdictions will make joining a regional initiative a challenge.
- Bridges between United States and Mexico can become congested, slowing commerce and customer travel
- Federal trade law uncertainty
- National competition for business development deals
- Changes to manufacturing and logistics industry and travel due to COVID-19 that are still developing
- More quality of life features needed for young adults
- Incredibly large and diverse region to determine common priorities and initiatives
- With previous national slowdowns, this region has experienced uncertainty in effects and recovery time
- Challenged relationship between the United States government and the Mexico government
- Whether real or perceived, escalation of drug cartel violence and/or collateral damage from law enforcement activities in Tamaulipas
- A more comprehensive regional organization will have funding challenges without the right value proposition and buy-in

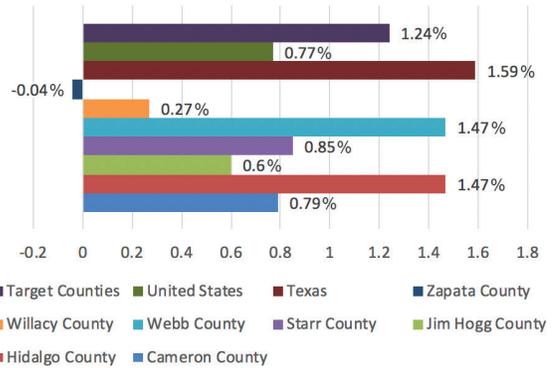


DEMOGRAPHICS

POPULATION – UNITED STATES



2019-2024 Population Growth (Percent)



Total Population and Median Age

Location	Total Population	Median Age	2019-2024 Growth/Yr (%):	Foreign Born Population (%):
Cameron	438,850	31.6	0.79%	23.5%
Hidalgo	892,240	29.5	1.47%	27.1%
Jim Hogg	5,685	37.1	0.6%	4%
Starr	68,280	30.3	0.85%	30.1%
Webb	285,552	29.2	1.47%	26.2%
Willacy	19,949	34.5	0.27%	16.9%
Zapata	14,015	29.7	-0.04%	26.9%
Texas	29,443,411	35	1.59%	17%
United States	332,417,793	38.5	0.77%	13.5%
Target Counties	1,724,571	30	1.24%	26%

Source: ESRI (2019), U.S. Census, 2014-2018

Insights

Cameron, Hidalgo and Webb County make up 93.7% of the total population in the project’s target counties. These 3 counties make up 5.5% of the total population of Texas.

Every county in the target area is below the US average for median age. The lowest median age areas are Cameron, Hidalgo and Webb Counties. These three counties, as mentioned earlier, contain the highest population percentages in the target area. There is a clear employment base in these areas for further development.



POPULATION - MEXICO

Location	2019 Total Population	Median Age
Carmargo	16,066	28
Guerrero	4,694	30
Gustavo Diaz Ordaz	15,954	31
Matamoros	544,973	27
Mier	4,345	33
Miguel Aleman	28,889	29
Nuevo Laredo	418,830	26
Reynosa	683,451	26
Rio Bravo	132,968	27
Valle Hermoso	66,633	28
Tamaulipas	3,602,535	28
Mexico	124,834,445	27
Target Municipios	1,916,803	N/A

Source: ESRI (2019)

POPULATION - COMBINED "MIRROR" REGIONS

Location	2019 Total Population
Cameron/Matamoros	983,823
Webb/Nuevo Laredo	704,382
Hidalgo/Reynosa	1,575,691

Source: ESRI (2019)

Insights

These three "mirror" regions represent significant population, which a significant part is workforce. Data for workforce on the Mexico side was not satisfactorily reliable to present total civilian labor force numbers.



CIVILIAN LABOR FORCE – UNITED STATES

Location	Civilian Pop 16+ / Labor Force (2019)	Employed Civilian Pop 16+ (2019)	Unemployment Rate (2019)
Cameron	174,552	164,232	5.9%
Hidalgo	362,440	341,149	5.9%
Jim Hogg	2,026	1,740	14.1%
Starr	26,557	24,057	9.4%
Webb	118,466	113,401	4.3%
Willacy	6,533	5,992	8.3%
Zapata	5,532	5,072	8.3%
Texas	14,531,701	13,861,959	4.6%
United States	168,006,863	160,353,898	4.6%
Target Counties	696,106	655,643	5.8%

Source: ESRI (2019)

CIVILIAN LABOR FORCE – MEXICO

Location	Economically Active Pop 12+ (2015)	Unemployment Rate (2015)
Carmargo	45.8%	4.6%
Guerrero	47.4%	7.6%
Gustavo Diaz Ordaz	46.8%	9%
Matamoros	52.1%	5.9%
Mier	45.4%	14.6%
Miguel Aleman	48.9%	6.9%
Nuevo Laredo	50.7%	4.4%
Reynosa	55.5%	4.2%
Rio Bravo	49.4%	7.4%
Valle Hermoso	48.5%	3.3%
Tamaulipas	50.4%	4.8%
Mexico	50.3%	4.1%
Target Municipios	52.9%	4.2%

Source: INEGI

CIVILIAN LABOR FORCE – UNEMPLOYMENT PRE- AND POST-COVID-19 OUTBREAK

Location	April 2019	February 2020	March 2020	April 2020	April 2019 - April 2020 Net Change
Cameron	4.7%	5.8%	8%	17.1%	12.4%
Hidalgo	5%	6.7%	9.4%	18.2%	13.2%
Jim Hogg	4.2%	4.7%	6.4%	12.3%	8.1%
Starr	7.8%	12.9%	17.3%	24.3%	16.5%
Webb	3.2%	3.9%	5.6%	13.6%	10.4%
Willacy	7.9%	8.2%	11.1%	17.4%	9.5%
Zapata	4.2%	6.2%	8.6%	13.5%	9.3%
Texas	3.5%	3.5%	5.1%	13.5%	10%
United States	3.6%	3.5%	4.4%	14.7%	11.1%

Source: U.S. Bureau of Labor Statistics (2019 and 2020)

Insights

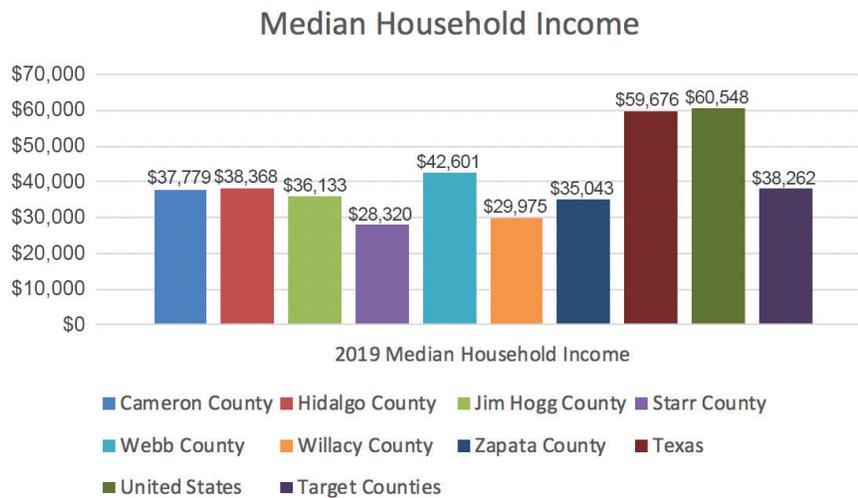
As this report has been written during the COVID-19 outbreak, the effects of the global slowdown have not been fully determined. Significant unemployment has occurred in each county of the target area, and trends higher than the State and National average in the most significant income-producing counties.



HOUSEHOLD INCOME – UNITED STATES

Location	2019 Median Household Income	2019 Per Capita Income	Average Annual Wage
Cameron	\$37,779	\$15,776	\$34,268
Hidalgo	\$38,368	\$15,910	\$35,516
Jim Hogg	\$36,133	\$19,985	\$40,872
Starr	\$28,320	\$12,416	\$31,876
Webb	\$42,601	\$16,140	\$37,024
Willacy	\$29,975	\$14,063	\$38,168
Zapata	\$35,043	\$14,886	\$52,364
Texas	\$59,676	\$30,194	\$57,668
United States	\$60,548	\$33,028	
Target Counties	\$38,262	\$15,760	\$38,584

Source: ESRI (2019), U.S. Bureau of Labor Statistics, Q3 2019



UNION MEMBERSHIP – UNITED STATES

Location	Member of Union: Percent
Cameron	2.55%
Hidalgo	2.47%
Jim Hogg	2.16%
Starr	2.14%
Webb	2.66%
Willacy	2.16%
Zapata	2.15%
Texas	3.25%
United States	3.75%
Target Counties	2.5%

Source: ESRI (2019)

Insights

Median household income for the target area is about \$20,000 less than the median household income for the State of Texas. The per capita income for the target area is nearly half of the per capita income of the State of Texas. Businesses with the capacity to pay higher wages could potentially out-compete the current business landscape on a wage basis. Union participation is lower than both the United States and Texas averages.



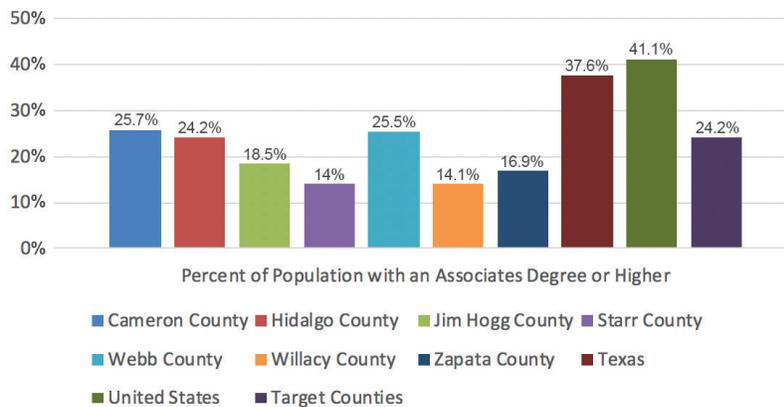
EDUCATIONAL ATTAINMENT – UNITED STATES

Percentage of Population at Educational Attainment Levels – 2019

County	Less than 9th Grade Education	High School / No Diploma	High School Diploma	With a GED
Cameron	18.6%	13%	21.1%	4.4%
Hidalgo	20.7%	13.3%	19.7%	3.9%
Jim Hogg	10.4%	16.4%	29.8%	3.9%
Starr	30.8%	18%	21.5%	3.2%
Webb	17.9%	13.3%	23.3%	4%
Willacy	21%	11.5%	30.5%	7.1%
Zapata	24.7%	17.6%	22.4%	3.5%
Texas	7.8%	8%	20.7%	4.3%
United States	4.9%	6.7%	23.1%	3.9%
Target Counties	20.1%	13.5%	20.9%	4.1%

Source: ESRI (2019)

Educational Attainment: Higher Education Rates



County	Some College / No Degree	Associates Degree	Bachelors Degree	Grad / Prof Degree	Associates Degree / or Higher
Cameron	17.1%	7.3%	13%	5.4%	25.7%
Hidalgo	18%	5%	13.7%	5.5%	24.2%
Jim Hogg	20.9%	6.6%	9.3%	2.7%	18.5%
Starr	12.4%	3.4%	7.7%	2.9%	14%
Webb	15.8%	6.9%	13%	5.5%	25.5%
Willacy	15.7%	4.3%	7.3%	2.4%	14.1%
Zapata	14.9%	4.5%	8.7%	3.6%	16.9%
Texas	21.5%	7.4%	19.7%	10.5%	37.6%
United States	20.2%	8.6%	20%	12.5%	41.1%
Target Counties	17.1%	5.9%	13%	5.3%	24.2%

Source: ESRI (2019)

Insights

Every county in the target area has a lower educational attainment than the State of Texas and The United States. At 25.73%, Cameron County boasts the highest percentage of the population (age 25 and over) with an Associates degree or higher. As illustrated in other data findings, Cameron, Hidalgo and Webb Counties stand above the rest of the target counties in the area of interest.

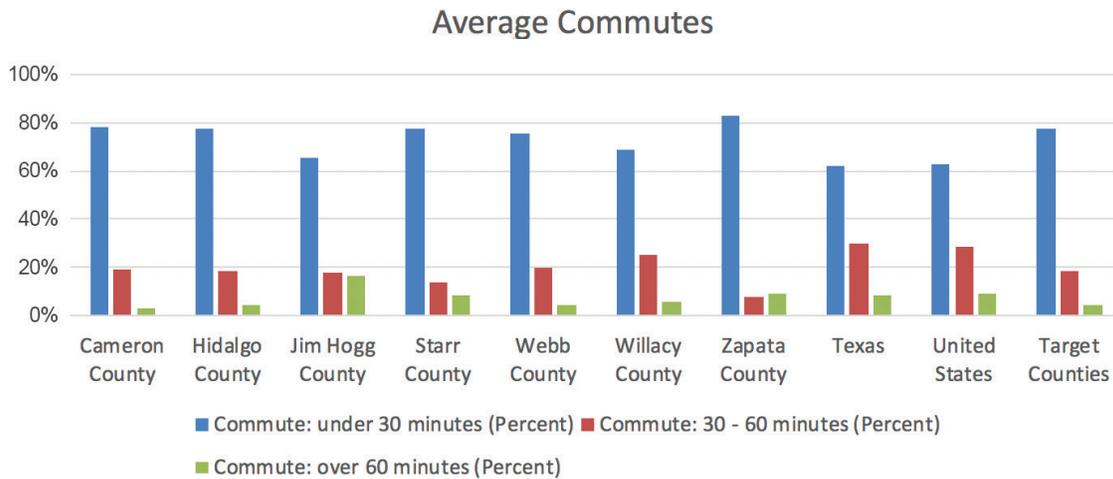


COMMUTING – UNITED STATES

Commute Timing of Workers 16+ by Percentage - 2019

Location	Total Businesses	Employed Civilian Pop 16+	< 30 minutes	30- 60 Minutes	Over 60 Minutes
Cameron	11,110	164,232	78.4%	18.8%	2.7%
Hidalgo	21,247	341,149	77.6%	18.3%	4.1%
Jim Hogg	167	1,740	65.8%	17.5%	16.7%
Starr	1,366	24,057	77.7%	13.7%	8.6%
Webb	8,583	113,401	75.8%	19.8%	4.3%
Willacy	437	5,992	69.1%	25.3%	5.6%
Zapata	344	5,072	83.2%	7.7%	9.1%
Texas	978,185	13,861,959	61.9%	30%	8.1%
United States	12,095,002	160,548,951	62.5%	28.6%	8.9%
Target Counties	43,254	655,643	77.4%	18.6%	4%

Source: ESRI (2019), American Community Survey 2013-2017



Insights

Every county in the target area has a higher percent of workers commuting under 30 minutes compared to the averages of Texas and the United States. Only 4% of workers in the target area have a commute to work over 60 minutes, which is half the rate of workers in Texas and the United states. The only major outlier is Jim Hogg County with 16.7% of workers commuting over 60 minutes. Jim Hogg county also has the fewest number of businesses (150) in the county.



HEALTHCARE – UNITED STATES

Health Insurance Coverage of All Ages by Percentage

Location	1 Type of Health Insurance	2 Types of Health Insurance	No Health Insurance	Employer Provided
Cameron	60.1%	10.8%	29.1%	27.63%
Hidalgo	58.4%	10%	31.6%	24.92%
Jim Hogg	65.2%	15.9%	18.9%	33.35%
Starr	54.7%	11.6%	33.7%	18.72%
Webb	61.9%	8.7%	29.3%	28.53%
Willacy	57.6%	12.6%	29.8%	22.02%
Zapata	57.6%	11.6%	30.8%	26.57%
Texas	69.3%	12.4%	18.2%	46.11%
United States	73.6%	15.9%	10.5%	49.32%
Target Counties	59.3%	10.1%	30.6%	25.99%

Source: American Community Survey 2013-2017

Insights

People of all ages in the target counties are uninsured at approximately three times the national average. Employer-provided health insurance is well below the United States average in all counties within the target area.

WEALTH AND POVERTY – UNITED STATES

Location	2019 Wealth Index	Insights
Cameron	48	<p>All counties in the 7-county region of study are well below the state and national average when it comes to wealth. Esri's Wealth Index is compiled from a number of indicators of affluence that include average household income and average net worth. The concept of wealth is defined by more than just above-average household income. Wealth also includes the value of material possessions and resources. Esri captures both income and the accumulation of substantial wealth, or the abundance of possessions and resources in its identification of the wealthiest areas in the country. The index represents the wealth of an area relative to the national level. Values exceeding 100 represent above-average wealth.</p>
Hidalgo	51	
Jim Hogg	57	
Starr	36	
Webb	52	
Willacy	41	
Zapata	39	
Texas	94	
United States	100	
Target Counties	49	

Source: ESRI (2019)

Location	Below Poverty Level (%)	Disconnected Youth*	*Percentage of teens and young adults ages 16-19 who are neither working nor in school.
Cameron	29.2%	13%	
Hidalgo	29.4%	9%	
Jim Hogg	26.6%	N/A	
Starr	35.7%	12%	
Webb	29.1%	10%	
Willacy	35.9%	23%	
Zapata	29.9%	N/A	
Texas	14.7%	8%	
United States	13.8%	N/A	
Target Counties	29.6%	N/A	

Source: ESRI (2019), American Community Survey 2013-2017, County Health Rankings & Roadmaps



2019 INCOME LEVEL BY AGE – AGES 15 TO 24: PERCENT

Location	<\$15,000	\$15K-24,999	\$25K-34,999	\$35K-49,999	\$50K-74,999	\$75K-99,999
Cameron	32.18%	20%	12.01%	11.98%	13.83%	5.92%
Hidalgo	30.2%	22.72%	11.63%	13.29%	12.11%	5.04%
Jim Hogg	26.98%	20.63%	12.7%	14.29%	12.7%	7.94%
Starr	35.58%	27.5%	9.57%	11.66%	9.57%	2.69%
Webb	27.63%	17.29%	14.57%	15.88%	14.4%	5.61%
Willacy	38.8%	18.58%	10.38%	12.02%	12.57%	3.83%
Zapata	30.33%	19.43%	13.74%	18.01%	9.48%	4.74%
Texas	21.54%	14.77%	13.53%	17.37%	15.67%	8.1%
United States	21.93%	14.07%	13.18%	16.74%	16.45%	7.84%
Target Counties	30.52%	21.39%	12.09%	13.37%	12.72%	5.23%

Location	\$100K-149,999	150K-199,999	\$200,000+
Cameron	3.31%	0.49%	0.28%
Hidalgo	3.39%	1.12%	0.51%
Jim Hogg	3.17%	0%	1.59%
Starr	2.69%	0.75%	0%
Webb	3.49%	0.78%	0.35%
Willacy	3.28%	0%	0.55%
Zapata	3.79%	0.47%	0%
Texas	6.01%	1.69%	1.32%
United States	6.31%	1.81%	1.66%
Target Counties	3.37%	0.89%	0.41%

Source: ESRI (2019)

Insights

When compared to the State of Texas and the United States, the target counties have significantly lower income levels and show lower earnings in the majority of income brackets. One outlier to recognize is the \$75K-99,000 income bracket for Jim Hogg county, which may be a result of income earned in the Natural Resources and Mining industry, which tends to pay above the average of other industries.



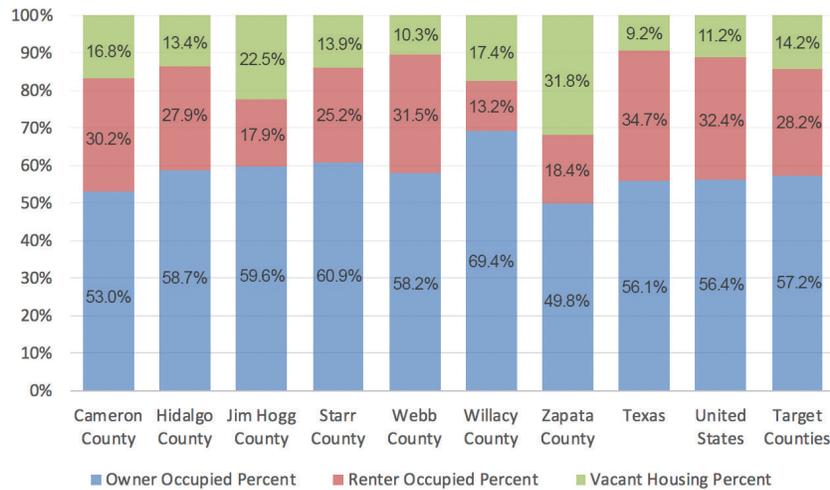
DEMOGRAPHICS

HOUSING AFFORDABILITY AND OCCUPIED TYPE - UNITED STATES

Location	2019 Total Population	2019 Housing Affordability Index	Insights
Cameron	438,850	162	ESRI's Housing Affordability Index (HAI) measures the financial ability of a typical household to purchase an existing home in an area. A HAI of 100 represents an area that on average has sufficient household income to qualify for a loan on a home valued at the median home price. An index greater than 100 suggests homes are easily afforded by the average area resident.
Hidalgo	892,240	157	
Jim Hogg	5,685	226	
Starr	68,280	184	
Webb	285,552	117	
Willacy	19,949	250	
Zapata	14,015	248	
Texas	29,443,411	132	
United States	332,417,793	120	
Target Counties	1,724,571	154	

Source: ESRI (2019)

OWNER, RENTER, VACANT HOUSING



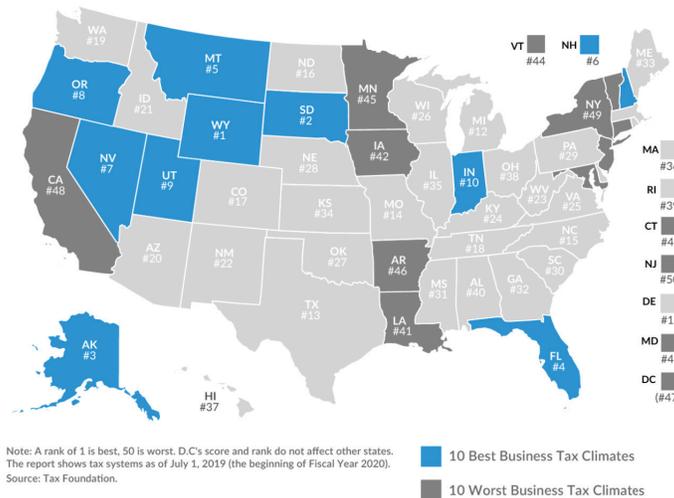
Location	Owner Occupied (%)	Renter Occupied (%)	Vacant Housing (%)
Cameron	53%	30.2%	16.8%
Hidalgo	58.7%	27.9%	13.4%
Jim Hogg	59.6%	17.9%	22.4%
Starr	60.9%	25.2%	13.9%
Webb	58.1%	31.5%	10.3%
Willacy	69.4%	13.2%	17.4%
Zapata	49.8%	18.4%	31.8%
Texas	56.1%	34.7%	9.2%
United States	56.4%	32.4%	11.2%
Target Counties	57.2%	28.6%	14.2%

Source: ESRI (2019)



TAX ENVIRONMENT

2020 STATE BUSINESS TAX CLIMATE INDEX RANKS AND COMPONENT TAX RANKS



Top 25 Ranking

State	Overall Rank	Corporate Tax Rank	Individual Income Tax Rank	Sales Tax Rank
Wyoming	1	1	1	6
South Dakota	2	1	1	35
Alaska	3	26	1	5
Florida	4	9	1	23
Montana	5	21	25	3
New Hampshire	6	43	9	1
Nevada	7	25	5	44
Oregon	8	33	38	4
Utah	9	12	10	22
Indiana	10	11	15	20
Delaware	11	50	41	2
Michigan	12	18	12	9
Texas	13	47	6	36
Missouri	14	5	24	24
North Carolina	15	3	16	21
North Dakota	16	19	20	27
Colorado	17	7	14	37
Tennessee	18	24	8	47
Washington	19	41	6	49
Arizona	20	22	17	40
Idaho	21	29	26	12
New Mexico	22	20	31	41
West Virginia	23	15	28	18
Kentucky	24	17	18	14
Virginia	25	14	35	11

Note: A rank of 1 is best, 50 is worst. Rankings do not average to the total. States without a tax rank equal 1. The report shows tax systems as of July 1, 2019 (the beginning of Fiscal Year 2020). Nevada, Ohio, Texas, and Washington do not have a corporate income tax but do have a gross receipts tax with rates not strictly comparable to corporate income tax rates. Delaware has gross receipts taxes in addition to corporate income taxes, as do several states like Pennsylvania, Virginia, and West Virginia, which permit gross receipts taxes at the local (but not state) level. Source: Tax Foundation.



PROPERTY TAX BY COUNTY

Location	Estimate of Median Real Estate Taxes Paid
Cameron	\$1,468
Hidalgo	\$1,722
Jim Hogg	\$910
Starr	\$696
Webb	\$2,623
Willacy	\$812
Zapata	\$584
Bexar*	\$2,996
Texas	\$2,922
United States	\$2,375

Source: ESRI (2018)

Insights

Annual average property tax burden by county are less than the State and National Average. Recognizing that San Antonio is sometimes a draw for young workforce from this region, the Bexar County estimate was discovered to be more costly than the State, National and 7-county region.

EDUCATION

Number of Education Institutions

Location	Number
Cameron	213
Hidalgo	404
Jim Hogg	3
Starr	30
Webb	102
Willacy	17
Zapata	7
Target Counties	776

Source: ESRI (2019)

Number of Education Institutions – By Kind

County	Universities	Supplemental Colleges	Public Schools (K-12)	Private Schools (K-12)	Colleges
Cameron	8	2	180	23	10
Hidalgo	16	6	353	29	22
Jim Hogg	0	0	3	0	0
Starr	0	1	28	1	1
Webb	5	3	83	11	8
Willacy	0	0	17	0	0
Zapata	0	0	6	1	0
Target Counties	29	12	670	65	41

Source: ESRI (2019) – Universities and Supplemental Colleges are recognized by Main Campus or Headquarters

Insights

Cameron, Hidalgo and Webb County have the most educational institutions by a large margin. These three counties make up 92.3% of all K-12 Schools and 40 of the 41 Colleges/Supplemental Educational Facilities in the target area.



TOP 30 INSTITUTIONS IN THE REGION BY ENROLLMENT

Institution	City	County	Enrollment
South Texas College	McAllen	Hidalgo	33,752
The University Of Texas Rio Grande Valley	Edinburg	Hidalgo	31,494
Laredo Community College	Laredo	Webb	10,705
Texas A & M International University	Laredo	Webb	8,456
Texas Southmost College	Brownsville	Cameron	6,655
Texas State Technical College	Harlingen	Cameron	4,394**
Southern Careers Institute-Pharr	Pharr	Hidalgo	554
RGV Careers	Pharr	Hidalgo	525
South Texas Vocational Technical Institute	McAllen	Hidalgo	483
South Texas Vocational Technical Institute	Weslaco	Hidalgo	477
Brightwood College	McAllen	Hidalgo	445
The College of Health Care Professions	McAllen	Hidalgo	420
Southern Careers Institute	Harlingen	Cameron	411
Southern Careers Institute	Brownsville	Cameron	362
Brightwood College	Brownsville	Cameron	331
South Texas Vocational Technical Institute	Brownsville	Cameron	317
Valley Grande Institute For Academic Studies	Weslaco	Hidalgo	313
Advanced Barber College And Hair Design	Weslaco	Hidalgo	252
Vogue College of Cosmetology	McAllen	Hidalgo	251
Texas A&M	McAllen	Hidalgo	250*
Brightwood College	Laredo	Webb	245
South Texas Training Center	San Benito	Cameron	194
UCAS University Of Cosmetology Arts & Sciences	McAllen	Hidalgo	187
Our Lady of the Lake University	LaFeria	Cameron	150*
UCAS University Of Cosmetology Arts & Sciences	Harlingen	Cameron	126
Laredo Beauty College Inc	Laredo	Webb	121
Texas A&M – Kingsville	Weslaco	Hidalgo	100*
Salon & Spa Institute	Brownsville	Cameron	94
Southern Texas Careers Academy	McAllen	Hidalgo	83

Source: ESRI (2019), Partner Outreach*, Wikipedia**



TOTAL DEGREES/CERTIFICATES BY TARGET AREA AS COMPARED TO STATE - 2018

Major	Target Area (Total)	Target Area (%)	Texas (Total)	Texas (%)	Difference (%)
Health Professions and Related Programs	5,144	25.3%	66,493	17.7%	7.6%
Liberal Arts and Sciences, General Studies and Humanities	2,405	11.8%	52,417	14%	-2.1%
Business, Management, Marketing, and Related Support Services	2,053	10.1%	56,889	15.2%	-5.1%
Homeland Security, Law Enforcement, Firefighting, and Related	1,144	5.6%	10,710	2.8%	2.8%
Computer and Information Sciences and Support Services	991	4.9%	14,278	3.8%	1.1%
Education	885	4.3%	16,579	4.4%	-0.1%
Personal and Culinary Services	817	4%	10,963	2.9%	1.1%
Psychology	787	3.9%	10,112	2.7%	1.2%
Biological and Biomedical Sciences	784	3.9%	11,570	3.1%	0.8%
Precision Production	709	3.5%	6,430	1.7%	1.8%
Mechanic and Repair Technologies/Technicians	516	2.5%	9,202	2.4%	0.1%
Multi/Interdisciplinary Studies	470	2.3%	12,980	3.5%	-1.1%
Public Administration and Social Service Professions	458	2.2%	5,112	1.4%	0.9%
Engineering Technologies and Engineering-related Fields	449	2.2%	8,745	2.3%	-0.1%
Engineering	414	2%	15,813	4.2%	-2.2%
Parks, Recreation, Leisure and Fitness Studies	340	1.7%	7,067	1.9%	-0.2%
Visual and Performing Arts	286	1.4%	7,711	2%	-0.6%
Social Sciences	237	1.2%	8,223	2.2%	-1%
English Language and Literature/Letters	221	1.1%	3,585	0.9%	0.1%
Communication, Journalism, and Related Programs	209	1%	7,501	2%	-1%
Construction Trades	204	1%	1,498	0.4%	0.6%
Mathematics and Statistics	169	0.8%	2,812	0.7%	0.1%
Family and Consumer Sciences/Human Sciences	153	0.7%	3,382	0.9%	-0.1%
Foreign Languages, Literatures, and Linguistics	147	0.7%	2,004	0.5%	0.2%
History	119	0.6%	2,125	0.6%	0.02%
Physical Sciences	86	0.4%	3,358	0.9%	-0.5%
Legal Professions and Studies	47	0.2%	3,385	0.9%	-0.7%
Natural Resources and Conservation	18	0.08%	1,286	0.3%	-0.2%
Philosophy and Religious Studies	15	0.07%	621	0.2%	-0.1%
Area, Ethnic, Cultural, Gender, and Group Studies	8	0.03%	230	0.1%	-0.02%
Architecture and Related Services	5	0.02%	1,260	0.3%	-0.3%
Military Technologies and Applied Sciences	0	0%	140	0.03%	-0.03%
Library Science	0	0%	683	0.2%	-0.2%
Transportation and Materials Moving	0	0%	778	0.2%	-0.2%
Communications Technologies/Technicians and Services	0	0%	989	0.3%	-0.3%
Theology and Religious Vocations	0	0%	1,925	0.5%	-0.5%
Science Technologies/Technicians	0	0%	1,992	0.5%	-0.5%
Agriculture, Agriculture Operations and Related Sciences	0	0%	3,636	1%	-1%

National Center for Educational Statistics - IPEDS - 2018

Insights

When compared to the State of Texas, the target area excels in the production of degrees/certificates in the Health Professions and Related Programs, as well as Homeland Security, Law Enforcement, Firefighting and Related Services. An outlier of note is the deficiency of degree/certificate production in the Business, Management, Marketing, and Related Support Services area compared to the State of Texas.



FOREIGN-OWNED COMPANIES IN REGION

CAMERON, HIDALGO AND WEBB COUNTY

Location	Establishments with foreign-ownership		Establishments with domestic-ownership	
	Average annual employment	Average annual employment	Average annual employment	Average weekly wage
United States	110,645,869	5,517,202	105,128,667	\$1,441
Texas	8,964,789	478,699	8,486,090	\$1,710
Cameron County	99,468	2,486	2,550,281	\$970
Hidalgo County	175,766	4,384	4,651,669	\$962
Webb County	69,563	1,650	1,976,636	\$853

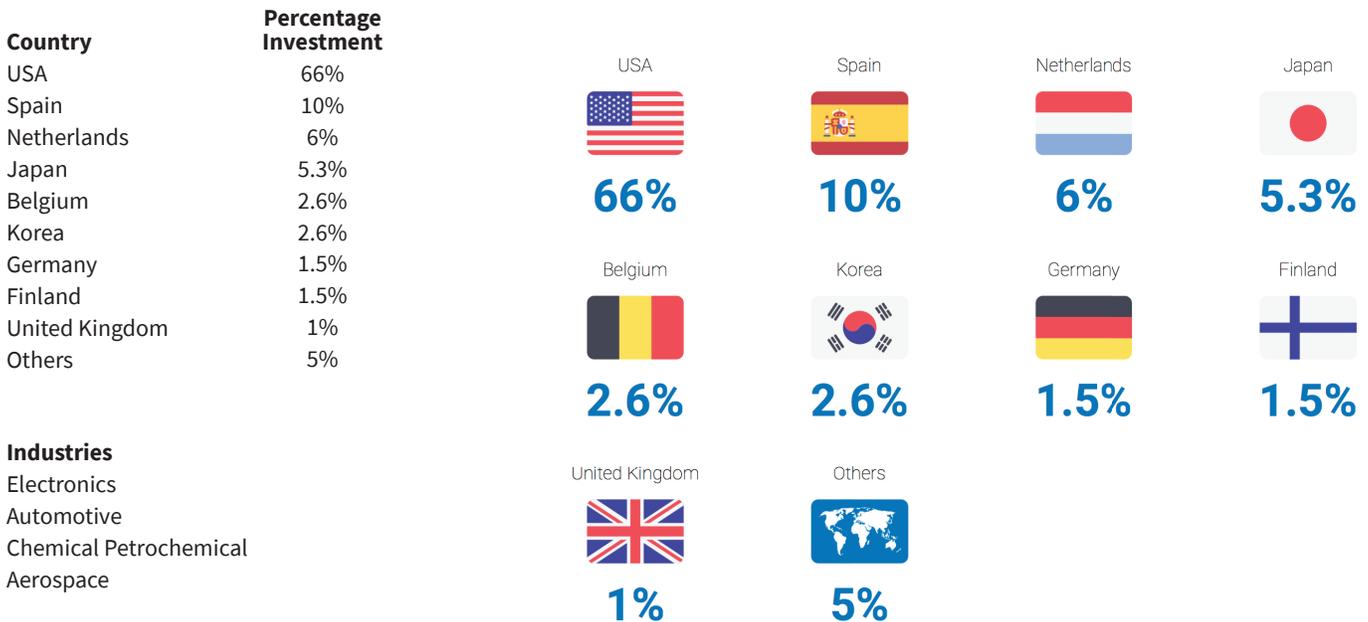
Insights

Cameron, Hidalgo and Webb are the only counties in the target area listed in the Bureau of Labor Statistics' 2012 summary of Foreign Direct Investment by county study. It should be noted that foreign-owned businesses have significantly higher wage rates than domestic-owned businesses, in the three counties analyzed.

Source: U.S. Bureau of Labor Statistics, 2012

STATE OF TAMAULIPAS – FOREIGN DIRECT INVESTMENT

In 2017, Tamaulipas received 1.3 billion dollars in Foreign Direct Investment, mainly in the manufacturing industries.

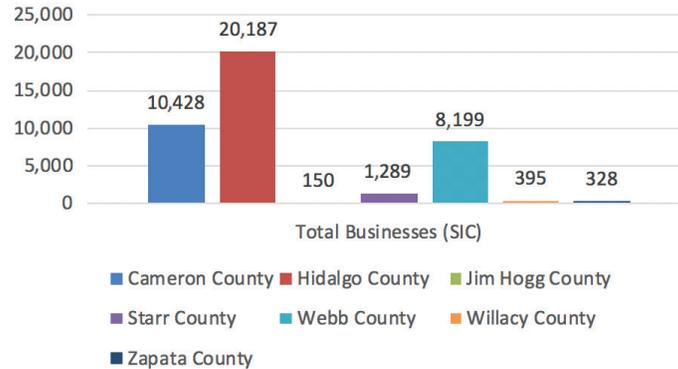


Source: www.mexicoindustrialmaps.com



BUSINESSES OVERVIEW

Total Businesses by County



United States

Location	Total Businesses (SIC)
Cameron	11,110
Hidalgo	21,247
Jim Hogg	167
Starr	1,366
Webb	8,583
Willacy	437
Zapata	344
Texas	978,185
United States	12,095,002
Target Counties	43,254

Source: ESRI (2019)

Mexico

Location	Total Businesses
Camargo	853
Guerrero	214
Gustavo Diaz Ordaz	846
Matamoros	20,680
Mier	308
Miguel Aleman	1,923
Nuevo Laredo	14,857
Reynosa	22,342
Rio Bravo	5,484
Valle Hermoso	3,730
Tamaulipas	131,388
Target Municipios	71,237

Source: DENUE (2019)

Insights

Cameron, Hidalgo and Webb County account for 94.7 % of all businesses in the U.S. target area. Hidalgo alone accounts for 49.3% of all businesses in the U.S. target area. The 10 municipios combined are home to almost two-thirds (62%) of all the businesses in the region. Further, the 10 municipios combined account for 54% of all businesses in Tamaulipas, while the 7 U.S. counties account for 4.4% of businesses in Texas.

NUMBER OF BUSINESSES BY EMPLOYEE COUNT

Location	0 - 50 Employees	51 - 100 Employees	Over 100 Employees
Cameron	10,747	231	132
Hidalgo	20,504	498	245
Jim Hogg	165	0	2
Starr	1,320	31	15
Webb	8,307	164	112
Willacy	420	10	7
Zapata	334	6	4

Source: ESRI (2019)



BUSINESS SUMMARY – ALL U.S. COUNTIES IN TARGET AREA

Data for all businesses in area

Total Businesses: 40,976 Total Residential Population: 1,724,571

Total Employees: 465,501 Employee/Residential Population Ratio (per 100 Residents): 27

BUSINESS TYPE	BUSINESSES		EMPLOYEES	
	NUMBER	PERCENT	NUMBER	PERCENT
Agriculture & Mining	524	1.3%	5,001	1.1%
Construction	1,544	3.8%	13,029	2.8%
Manufacturing	868	2.1%	16,213	3.5%
Transportation	2,156	5.3%	23,603	5.1%
Communication	572	1.4%	4,086	0.9%
Utility	113	0.3%	1,471	0.3%
Wholesale Trade	1,751	4.3%	16,639	3.6%
Retail Trade Summary	10,659	26.0%	132,782	28.5%
Home Improvement	397	1.0%	5,072	1.1%
General Merchandise Stores	622	1.5%	21,721	4.7%
Food Stores	1,504	3.7%	19,084	4.1%
Auto Dealers, Gas Stations, Auto Aftermarket	1,551	3.8%	13,902	3.0%
Apparel & Accessory Stores	795	1.9%	6,903	1.5%
Furniture & Home Furnishings	425	1.0%	4,303	0.9%
Eating & Drinking Places	3,228	7.9%	47,281	10.2%
Miscellaneous Retail	2,137	5.2%	14,516	3.1%
Finance, Insurance, Real Estate Summary	3,672	9.0%	28,271	6.1%
Banks, Savings & Lending Institutions	976	2.4%	14,472	3.1%
Securities Brokers	393	1.0%	1,348	0.3%
Insurance Carriers & Agents	991	2.4%	4,714	1.0%
Real Estate, Holding, Other Investment Offices	1,312	3.2%	7,737	1.7%
Services Summary	14,479	35.3%	196,548	42.2%
Hotels & Lodging	420	1.0%	5,101	1.1%
Automotive Services	1,179	2.9%	5,167	1.1%
Motion Pictures & Amusements	857	2.1%	6,426	1.4%
Health Services	2,596	6.3%	48,868	10.5%
Legal Services	715	1.7%	3,447	0.7%
Education Institutions & Libraries	1,240	3.0%	77,994	16.8%
Other Services	7,472	18.2%	49,545	10.6%
Government	1,248	3.0%	25,553	5.5%
Unclassified Establishments	3,390	8.3%	2,305	0.5%
Totals	40,976	100.0%	465,501	100.0%

Source: ESRI (2019) – Business Summary data is based on estimates and to ensure accurate and complete information. Infogroup conducts annual telephone verifications with each business listed in the database.

Insights

Though dominated by service industries (35.3% of businesses and 42.2% of employees) and retail trade (26% of businesses and 28.5% of employees), some data points are worth noting, including more predominance in transportation (5.3% of businesses and 5.1% of employees). The Finance, Insurance and Real Estate sector account for 9.0% of businesses and 6.1% of employees, and under Services, the sub-sectors of Health Services and Education Institutions show predominance.



BUSINESS SUMMARY – CAMERON COUNTY

Data for all businesses in area

Total Businesses: 10,428 Total Residential Population: 438,850

Total Employees: 115,848 Employee/Residential Population Ratio (per 100 Residents): 26

BUSINESS TYPE	BUSINESSES		EMPLOYEES	
	NUMBER	PERCENT	NUMBER	PERCENT
Agriculture & Mining	117	1.1%	688	0.6%
Construction	376	3.6%	2,810	2.4%
Manufacturing	245	2.3%	6,708	5.8%
Transportation	373	3.6%	4,078	3.5%
Communication	148	1.4%	800	0.7%
Utility	26	0.2%	526	0.5%
Wholesale Trade	404	3.9%	3,904	3.4%
Retail Trade Summary	2,670	25.6%	32,460	28.0%
Home Improvement	104	1.0%	1,358	1.2%
General Merchandise Stores	149	1.4%	5,184	4.5%
Food Stores	352	3.4%	4,006	3.5%
Auto Dealers, Gas Stations, Auto Aftermarket	365	3.5%	3,251	2.8%
Apparel & Accessory Stores	177	1.7%	1,224	1.1%
Furniture & Home Furnishings	100	1.0%	944	0.8%
Eating & Drinking Places	874	8.4%	12,698	11.0%
Miscellaneous Retail	549	5.3%	3,795	3.3%
Finance, Insurance, Real Estate Summary	1,036	9.9%	6,577	5.7%
Banks, Savings & Lending Institutions	253	2.4%	2,163	1.9%
Securities Brokers	76	0.7%	249	0.2%
Insurance Carriers & Agents	291	2.8%	1,516	1.3%
Real Estate, Holding, Other Investment Offices	416	4.0%	2,649	2.3%
Services Summary	3,833	36.8%	49,088	42.4%
Hotels & Lodging	150	1.4%	1,671	1.4%
Automotive Services	285	2.7%	1,192	1.0%
Motion Pictures & Amusements	247	2.4%	2,124	1.8%
Health Services	627	6.0%	11,660	10.1%
Legal Services	189	1.8%	878	0.8%
Education Institutions & Libraries	344	3.3%	17,143	14.8%
Other Services	1,991	19.1%	14,420	12.4%
Government	354	3.4%	6,743	5.8%
Unclassified Establishments	846	8.1%	1,466	1.3%
Totals	10,428	100.0%	115,848	100.0%

Source: ESRI (2019)



BUSINESS SUMMARY – HIDALGO COUNTY

Data for all businesses in area

Total Businesses: 20,187 Total Residential Population: 892,240

Total Employees: 238,366 Employee/Residential Population Ratio (per 100 Residents): 27

BUSINESS TYPE	BUSINESSES		EMPLOYEES	
	NUMBER	PERCENT	NUMBER	PERCENT
Agriculture & Mining	241	1.2%	2,219	0.9%
Construction	809	4.0%	6,743	2.8%
Manufacturing	430	2.1%	7,262	3.0%
Transportation	677	3.4%	8,024	3.4%
Communication	292	1.4%	2,290	1.0%
Utility	43	0.2%	540	0.2%
Wholesale Trade	928	4.6%	9,368	3.9%
Retail Trade Summary	5,389	26.7%	69,012	29.0%
Home Improvement	206	1.0%	2,683	1.1%
General Merchandise Stores	313	1.6%	11,800	5.0%
Food Stores	802	4.0%	10,625	4.5%
Auto Dealers, Gas Stations, Auto Aftermarket	783	3.9%	6,511	2.7%
Apparel & Accessory Stores	411	2.0%	3,733	1.6%
Furniture & Home Furnishings	210	1.0%	2,357	1.0%
Eating & Drinking Places	1,610	8.0%	23,720	10.0%
Miscellaneous Retail	1,054	5.2%	7,583	3.2%
Finance, Insurance, Real Estate Summary	1,817	9.0%	15,528	6.5%
Banks, Savings & Lending Institutions	472	2.3%	9,172	3.8%
Securities Brokers	223	1.1%	727	0.3%
Insurance Carriers & Agents	493	2.4%	2,103	0.9%
Real Estate, Holding, Other Investment Offices	629	3.1%	3,526	1.5%
Services Summary	7,386	36.6%	107,034	44.9%
Hotels & Lodging	196	1.0%	2,405	1.0%
Automotive Services	607	3.0%	2,415	1.0%
Motion Pictures & Amusements	428	2.1%	3,123	1.3%
Health Services	1,464	7.3%	28,346	11.9%
Legal Services	385	1.9%	1,966	0.8%
Education Institutions & Libraries	603	3.0%	44,690	18.7%
Other Services	3,703	18.3%	24,089	10.1%
Government	460	2.3%	9,739	4.1%
Unclassified Establishments	1715	8.5%	607	0.3%
Totals	20,187	100.0%	238,366	100.0%

Source: ESRI (2019)



BUSINESS SUMMARY – JIM HOGG COUNTY

Data for all businesses in area

Total Businesses: 150

Total Residential Population: 5,685

Total Employees: 1,517

Employee/Residential Population Ratio (per 100 Residents): 27

BUSINESS TYPE	BUSINESSES		EMPLOYEES	
	NUMBER	PERCENT	NUMBER	PERCENT
Agriculture & Mining	10	6.7%	98	6.5%
Construction	7	4.7%	37	2.4%
Manufacturing	4	2.7%	17	1.1%
Transportation	7	4.7%	56	3.7%
Communication	2	1.3%	11	0.7%
Utility	1	0.7%	9	0.6%
Wholesale Trade	7	4.7%	57	3.8%
Retail Trade Summary	41	27.3%	260	17.1%
Home Improvement	3	2.0%	18	1.2%
General Merchandise Stores	2	1.3%	11	0.7%
Food Stores	8	5.3%	64	4.2%
Auto Dealers, Gas Stations, Auto Aftermarket	8	5.3%	52	3.4%
Apparel & Accessory Stores	2	1.3%	5	0.3%
Furniture & Home Furnishings	1	0.7%	3	0.2%
Eating & Drinking Places	11	7.3%	92	6.1%
Miscellaneous Retail	6	4.0%	15	1.0%
Finance, Insurance, Real Estate Summary	15	10.0%	76	5.0%
Banks, Savings & Lending Institutions	9	6.0%	60	4.0%
Securities Brokers	1	0.7%	6	0.4%
Insurance Carriers & Agents	3	2.0%	7	0.5%
Real Estate, Holding, Other Investment Offices	2	1.3%	3	0.2%
Services Summary	29	19.3%	396	26.1%
Hotels & Lodging	3	2.0%	16	1.1%
Automotive Services	2	1.3%	4	0.3%
Motion Pictures & Amusements	2	1.3%	2	0.1%
Health Services	7	4.7%	111	7.3%
Legal Services	0	0.0%	0	0.0%
Education Institutions & Libraries	3	2.0%	222	14.6%
Other Services	12	8.0%	41	2.7%
Government	25	16.7%	500	33.0%
Unclassified Establishments	2	1.3%	0	0.0%
Totals	150	100.0%	1,517	100.0%

Source: ESRI (2019)



BUSINESS SUMMARY – STARR COUNTY

Data for all businesses in area

Total Businesses: 1,289

Total Employees: 12,097

Total Residential Population: 68,280

Employee/Residential Population Ratio (per 100 Residents): 18

BUSINESS TYPE	BUSINESSES		EMPLOYEES	
	NUMBER	PERCENT	NUMBER	PERCENT
Agriculture & Mining	13	1.0%	101	0.8%
Construction	29	2.2%	122	1.0%
Manufacturing	14	1.1%	78	0.6%
Transportation	45	3.5%	276	2.3%
Communication	22	1.7%	91	0.8%
Utility	14	1.1%	103	0.9%
Wholesale Trade	45	3.5%	200	1.7%
Retail Trade Summary	406	31.5%	3,308	27.3%
Home Improvement	17	1.3%	140	1.2%
General Merchandise Stores	32	2.5%	592	4.9%
Food Stores	70	5.4%	514	4.2%
Auto Dealers, Gas Stations, Auto Aftermarket	69	5.4%	438	3.6%
Apparel & Accessory Stores	13	1.0%	59	0.5%
Furniture & Home Furnishings	10	0.8%	65	0.5%
Eating & Drinking Places	132	10.2%	1,133	9.4%
Miscellaneous Retail	63	4.9%	367	3.0%
Finance, Insurance, Real Estate Summary	95	7.4%	440	3.6%
Banks, Savings & Lending Institutions	47	3.6%	278	2.3%
Securities Brokers	2	0.2%	9	0.1%
Insurance Carriers & Agents	28	2.2%	94	0.8%
Real Estate, Holding, Other Investment Offices	18	1.4%	59	0.5%
Services Summary	460	35.7%	6,221	51.4%
Hotels & Lodging	6	0.5%	38	0.3%
Automotive Services	40	3.1%	100	0.8%
Motion Pictures & Amusements	17	1.3%	105	0.9%
Health Services	96	7.4%	1,431	11.8%
Legal Services	19	1.5%	88	0.7%
Education Institutions & Libraries	54	4.2%	3,197	26.4%
Other Services	228	17.7%	1,262	10.4%
Government	90	7.0%	1,136	9.4%
Unclassified Establishments	56	4.3%	21	0.2%
Totals	1,289	100.0%	12,097	100.0%

Source: ESRI (2019)



BUSINESS SUMMARY – WEBB COUNTY

Data for all businesses in area

Total Businesses: 8,199

Total Residential Population: 285,552

Total Employees: 90,455

Employee/Residential Population Ratio (per 100 Residents): 32

BUSINESS TYPE	BUSINESSES		EMPLOYEES	
	NUMBER	PERCENT	NUMBER	PERCENT
Agriculture & Mining	107	1.3%	1,144	1.3%
Construction	305	3.7%	3,018	3.3%
Manufacturing	161	2.0%	2,089	2.3%
Transportation	1,025	12.5%	11,020	12.2%
Communication	103	1.3%	766	0.8%
Utility	19	0.2%	177	0.2%
Wholesale Trade	355	4.3%	3,000	3.3%
Retail Trade Summary	1,962	23.9%	26,315	29.1%
Home Improvement	60	0.7%	829	0.9%
General Merchandise Stores	112	1.4%	4,051	4.5%
Food Stores	239	2.9%	3,509	3.9%
Auto Dealers, Gas Stations, Auto Aftermarket	296	3.6%	3,466	3.8%
Apparel & Accessory Stores	183	2.2%	1,861	2.1%
Furniture & Home Furnishings	97	1.2%	904	1.0%
Eating & Drinking Places	543	6.6%	9,083	10.0%
Miscellaneous Retail	432	5.3%	2,612	2.9%
Finance, Insurance, Real Estate Summary	652	8.0%	5,392	6.0%
Banks, Savings & Lending Institutions	173	2.1%	2,657	2.9%
Securities Brokers	90	1.1%	354	0.4%
Insurance Carriers & Agents	158	1.9%	941	1.0%
Real Estate, Holding, Other Investment Offices	231	2.8%	1,440	1.6%
Services Summary	2,523	30.8%	30,868	34.1%
Hotels & Lodging	47	0.6%	859	0.9%
Automotive Services	221	2.7%	1,398	1.5%
Motion Pictures & Amusements	150	1.8%	1,028	1.1%
Health Services	365	4.5%	6,833	7.6%
Legal Services	117	1.4%	508	0.6%
Education Institutions & Libraries	200	2.4%	11,527	12.7%
Other Services	1,423	17.4%	8,715	9.6%
Government	251	3.1%	6,471	7.2%
Unclassified Establishments	736	9.0%	195	0.2%
Totals	8,199	100%	90,455	100.0%

Source: ESRI (2019)



BUSINESS SUMMARY – WILLACY COUNTY

Data for all businesses in area

Total Businesses: 395

Total Residential Population: 19,949

Total Employees: 4,325

Employee/Residential Population Ratio (per 100 Residents): 22

BUSINESS TYPE	BUSINESSES		EMPLOYEES	
	NUMBER	PERCENT	NUMBER	PERCENT
Agriculture & Mining	22	5.6%	371	8.6%
Construction	6	1.5%	227	5.2%
Manufacturing	11	2.8%	50	1.2%
Transportation	15	3.8%	76	1.8%
Communication	4	1.0%	124	2.9%
Utility	3	0.8%	19	0.4%
Wholesale Trade	6	1.5%	69	1.6%
Retail Trade Summary	95	24.1%	793	18.3%
Home Improvement	4	1.0%	27	0.6%
General Merchandise Stores	6	1.5%	38	0.9%
Food Stores	18	4.6%	229	5.3%
Auto Dealers, Gas Stations, Auto Aftermarket	14	3.5%	90	2.1%
Apparel & Accessory Stores	6	1.5%	14	0.3%
Furniture & Home Furnishings	3	0.8%	17	0.4%
Eating & Drinking Places	24	6.1%	278	6.4%
Miscellaneous Retail	20	5.1%	100	2.3%
Finance, Insurance, Real Estate Summary	35	8.9%	139	3.2%
Banks, Savings & Lending Institutions	14	3.5%	76	1.8%
Securities Brokers	0	0.0%	0	0.0%
Insurance Carriers & Agents	11	2.8%	35	0.8%
Real Estate, Holding, Other Investment Offices	10	2.5%	28	0.6%
Services Summary	145	36.7%	1,958	45.3%
Hotels & Lodging	9	2.3%	64	1.5%
Automotive Services	12	3.0%	24	0.6%
Motion Pictures & Amusements	7	1.8%	17	0.4%
Health Services	18	4.6%	313	7.2%
Legal Services	3	0.8%	5	0.1%
Education Institutions & Libraries	19	4.8%	663	15.3%
Other Services	77	19.5%	872	20.2%
Government	34	8.6%	483	11.2%
Unclassified Establishments	19	4.8%	16	0.4%
Totals	395	100.0%	4,325	100.0%

Source: ESRI (2019)



BUSINESS SUMMARY – ZAPATA COUNTY

Data for all businesses in area

Total Businesses: 328

Total Residential Population: 14,015

Total Employees: 2,893

Employee/Residential Population Ratio (per 100 Residents): 21

BUSINESS TYPE	BUSINESSES		EMPLOYEES	
	NUMBER	PERCENT	NUMBER	PERCENT
Agriculture & Mining	14	4.3%	380	13.1%
Construction	12	3.7%	72	2.5%
Manufacturing	3	0.9%	9	0.3%
Transportation	14	4.3%	73	2.5%
Communication	1	0.3%	4	0.1%
Utility	7	2.1%	97	3.4%
Wholesale Trade	6	1.8%	41	1.4%
Retail Trade Summary	96	29.3%	634	21.9%
Home Improvement	3	0.9%	17	0.6%
General Merchandise Stores	8	2.4%	45	1.6%
Food Stores	15	4.6%	137	4.7%
Auto Dealers, Gas Stations, Auto Aftermarket	16	4.9%	94	3.2%
Apparel & Accessory Stores	3	0.9%	7	0.2%
Furniture & Home Furnishings	4	1.2%	13	0.4%
Eating & Drinking Places	34	10.4%	277	9.6%
Miscellaneous Retail	13	4.0%	44	1.5%
Finance, Insurance, Real Estate Summary	22	6.7%	119	4.1%
Banks, Savings & Lending Institutions	8	2.4%	66	2.3%
Securities Brokers	1	0.3%	3	0.1%
Insurance Carriers & Agents	7	2.1%	18	0.6%
Real Estate, Holding, Other Investment Offices	6	1.8%	32	1.1%
Services Summary	103	31.4%	983	34.0%
Hotels & Lodging	9	2.7%	48	1.7%
Automotive Services	12	3.7%	34	1.2%
Motion Pictures & Amusements	6	1.8%	27	0.9%
Health Services	19	5.8%	174	6.0%
Legal Services	2	0.6%	2	0.1%
Education Institutions & Libraries	17	5.2%	552	19.1%
Other Services	38	11.6%	146	5.0%
Government	34	10.4%	481	16.6%
Unclassified Establishments	16	4.9%	0	0.0%
Totals	328	100.0%	2,893	100.0%

Source: ESRI (2019)



BUSINESS PREDOMINANCE

UNITED STATES COUNTIES

Cameron

Type of Business	Total Count
Food Services and Drinking Places	890
Professional, Scientific, and Technical Services	792
Credit Intermediation and Related Activities	623
Ambulatory Health Care Services	602
Personal and Laundry Services	437
Real Estate	415
Religious, Grantmaking, Civic, Professional, and Similar Organizations	388
Educational Services	383
Motor Vehicle and Parts Dealers	337
Merchant Wholesalers, Durable Goods	321

Hidalgo

Type of Business	Total Count
Food Services and Drinking Places	1,644
Professional, Scientific, and Technical Services	1,527
Ambulatory Health Care Services	1,434
Credit Intermediation and Related Activities	927
Personal and Laundry Services	836
Motor Vehicle and Parts Dealers	686
Food and Beverage Stores	677
Merchant Wholesalers, Durable Goods	673
Educational Services	667
Religious, Grantmaking, Civic, Professional, and Similar Organizations	634

Jim Hogg

Type of Business	Total Count
Executive, Legislative, and Other General Government Support	21
Credit Intermediation and Related Activities	16
Food Services and Drinking Places	12
Food and Beverage Stores	8
Specialty Trade Contractors	7
Ambulatory Health Care Services	6
Religious, Grantmaking, Civic, Professional, and Similar Organizations	6
Animal Production and Aquaculture	5
Merchant Wholesalers, Nondurable Goods	5
Motor Vehicle and Parts Dealers	5

Starr

Type of Business	Total Count
Food Services and Drinking Places	136
Ambulatory Health Care Services	99
Credit Intermediation and Related Activities	80
Food and Beverage Stores	71
Professional, Scientific, and Technical Services	71
Executive, Legislative, and Other General Government Support	65
Religious, Grantmaking, Civic, Professional, and Similar Organizations	60
Personal and Laundry Services	54
Educational Services	53
Motor Vehicle and Parts Dealers	49

Source: ESRI (2019)



Webb

Type of Business	Total Count
Professional, Scientific, and Technical Services	792
Food Services and Drinking Places	554
Support Activities for Transportation	488
Credit Intermediation and Related Activities	388
Ambulatory Health Care Services	354
Truck Transportation	303
Merchant Wholesalers, Durable Goods	279
Personal and Laundry Services	263
Motor Vehicle and Parts Dealers	252
Repair and Maintenance	247

Willacy

Type of Business	Total Count
Credit Intermediation and Related Activities	32
Religious, Grantmaking, Civic, Professional, and Similar Organizations	29
Executive, Legislative, and Other General Government Support	29
Food Services and Drinking Places	25
Professional, Scientific, and Technical Services	23
Ambulatory Health Care Services	19
Food and Beverage Stores	18
Educational Services	18
Personal and Laundry Services	13
Social Assistance	11

Zapata

Type of Business	Total Count
Food Services and Drinking Places	33
Executive, Legislative, and Other General Government Support	24
Credit Intermediation and Related Activities	22
Specialty Trade Contractors	18
Ambulatory Health Care Services	18
Food and Beverage Stores	15
Educational Services	14
Repair and Maintenance	13
Professional, Scientific, and Technical Services	11
Gasoline Stations	10

Source: ESRI (2019)



BUSINESS PREDOMINANCE

MEXICO MUNICIPIOS

Valle Hermoso

Type of Business	Total Count
Repair and maintenance services	543
Retail trade of groceries, food, beverages, ice and tobacco	423
Retail trade of household goods, computers, interior decorative articles and used goods	396
Food and beverage preparation services	371
Personal services	198
Retail trade in self-service shops and department stores	188
Associations and Organizations	148
Food industry	124
Retail trade of textile products, costume jewelry, clothing accessories and footwear	109
Outpatient medical services and related services	104

Rio Bravo

Type of Business	Total Count
Retail trade of groceries, food, beverages, ice and tobacco	644
Repair and maintenance services	627
Food and beverage preparation services	526
Retail trade of household goods, computers, interior decorative articles and used goods	419
Personal services	339
Retail trade in self-service shops and department stores	314
Outpatient medical services and related services	287
Associations and Organizations	274
Retail trade of textile products, costume jewelry, clothing accessories and footwear	221
Retail trade of stationery supplies, recreational and other personal goods	208

Reynosa

Type of Business	Total Count
Retail trade of groceries, food, beverages, ice and tobacco	2,898
Repair and maintenance services	2,124
Retail trade of household goods, computers, interior decorative articles and used goods	2,021
Food and beverage preparation services	1,878
Personal services	1,619
Retail trade in self-service shops and department stores	1,178
Retail trade of textile products, costume jewelry, clothing accessories and footwear	1,059
Retail trade of stationery supplies, recreational and other personal goods	943
Outpatient medical services and related services	872
Associations and Organizations	821

Source: DENU (2019)



Miguel Aleman

Type of Business

	Total Count
Retail trade of groceries, food, beverages, ice and tobacco	268
Repair and maintenance services	212
Food and beverage preparation services	207
Retail trade of household goods, computers, interior decorative articles and used goods	200
Personal services	115
Outpatient medical services and related services	111
Retail trade of stationery supplies, recreational and other personal goods	80
Retail trade of textile products, costume jewelry, clothing accessories and footwear	78
Retail trade in self-service shops and department stores	62
Retail trade of motor vehicles, parts, fuels and lubricants	62

Nuevo Laredo

Type of Business

	Total Count
Retail trade of groceries, food, beverages, ice and tobacco	1,836
Food and beverage preparation services	1,677
Repair and maintenance services	1,589
Personal services	1,095
Retail trade of household goods, computers, interior decorative articles and used goods	933
Retail trade of textile products, costume jewelry, clothing accessories and footwear	623
Associations and Organizations	615
Retail trade of stationery supplies, recreational and other personal goods	590
Outpatient medical services and related services	559
Educational services	457

Matamoros

Type of Business

	Total Count
Retail trade of groceries, food, beverages, ice and tobacco	2,603
Repair and maintenance services	2,444
Food and beverage preparation services	2,303
Retail trade of household goods, computers, interior decorative articles and used goods	1,559
Personal services	1,487
Outpatient medical services and related services	899
Associations and Organizations	855
Retail trade of textile products, costume jewelry, clothing accessories and footwear	752
Retail trade in self-service shops and department stores	680
Retail trade of stationery supplies, recreational and other personal goods	646

Mier

Type of Business

	Total Count
Retail trade of groceries, food, beverages, ice and tobacco	62
Food and beverage preparation services	44
Repair and maintenance services	34
Legislative, governmental and justice administration activities	21
Personal services	14
Associations and Organizations	13
Retail trade of stationery supplies, recreational and other personal goods	10
Retail trade of textile products, costume jewelry, clothing accessories and footwear	9
Educational services	8
Retail trade of household goods, computers, interior decorative articles and used goods	8

Source: DENU (2019)



Gustavo Diaz Ordaz

Type of Business	Total Count
Repair and maintenance services	110
Retail trade of groceries, food, beverages, ice and tobacco	109
Food and beverage preparation services	103
Retail trade in self-service shops and department stores	47
Retail trade of textile products, costume jewelry, clothing accessories and footwear	42
Personal services	40
Associations and Organizations	38
Legislative, governmental and justice administration activities	37
Retail trade of household goods, computers, interior decorative articles and used goods	33
Amusement services in recreational facilities and other recreational services	23

Guerrero

Type of Business	Total Count
Fishing, hunting and trapping	39
Food and beverage preparation services	27
Retail trade of groceries, food, beverages, ice and tobacco	25
Repair and maintenance services	22
Associations and Organizations	10
Legislative, governmental and justice administration activities	9
Personal services	8
Retail trade in self-service shops and department stores	7
Educational services	6
Outpatient medical services and related services	6

Camargo

Type of Business	Total Count
Food and beverage preparation services	102
Repair and maintenance services	101
Retail trade of groceries, food, beverages, ice and tobacco	101
Retail trade of household goods, computers, interior decorative articles and used goods	49
Fishing, hunting and trapping	44
Outpatient medical services and related services	43
Personal services	43
Legislative, governmental and justice administration activities	36
Retail trade of textile products, costume jewelry, clothing accessories and footwear	36
Associations and Organizations	29

Source: DENE (2019)



TARGET INDUSTRIES

INTRODUCTION

As part of this economic assessment, target industries were identified that can be further supported with binational collaboration, regional partner alignment, talent development, infrastructure investment, and business services support. Choosing to target these specific industries for business retention and expansion, business recruitment, entrepreneurial development, and foreign direct investment is a significant way to maximize business development efforts. The determination of target industries is a result of analyzing business data, labor data and interviewing stakeholders in the region who interact with business on a daily basis.

By identifying the following target market industries, we are providing guidance how resources can be allocated in business development, talent development and infrastructure. Also, this information can be used to better align partners in the ecosystem to avoid duplication of services and amplify results when the sharing of information/data is permissible.

Though not an industry per se, it is important to include entrepreneurs and innovators among target recommendations. The health of the innovation ecosystem is important in influencing the success of all industries in the region.

The Use of Location Quotient Data in Determination of Target Industries

Primary industries that represent significant tax-generating opportunities were identified using business predominance, talent predominance, income data and location/wage location quotients. Location quotients compare the concentration of an industry within a specific area to the concentration of that industry nationwide. These quotients are ratios that allow an area’s distribution of employment by industry, ownership, and size class to be compared to a reference area’s distribution. The U.S. is used as the reference area for all LQs in the following data sets. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the nation. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case nationwide. To further validate target industry opportunities, year-to-year employment growth was analyzed at the county level to determine growth levels over the state average.

TARGET INDUSTRY – TRADE, TRANSPORTATION AND UTILITIES

Location	Establishments	September Employment	Average Weekly Wage	Employment LQ	Total Wage LQ
Webb	2,415	31,417	\$697	1.66	1.89
Hidalgo	3,601	52,295	\$649	1.07	1.21
Cameron	1,676	24,617	\$626	0.95	1.06
Jim Hogg	29	238	\$615	0.77	0.73
Starr	166	2,012	\$534	0.74	0.75
Willacy	55	439	\$663	0.60	0.64
Zapata	34	330	\$557	0.52	0.34

ONE YEAR EMPLOYMENT GAIN 2018-2019 - THOSE COUNTIES WITH HIGHER THAN STATE GROWTH HIGHLIGHTED

Location	Establishments	Employment	Gain/Loss Percent
Texas	150,013	2,483,060	.8%
Webb	2,415	31,417	3%
Jim Hogg	29	238	5.3%
Starr	166	2,012	2%



The trade, transportation, and utilities supersector consists of these sectors: the Wholesale Trade sector, the Retail Trade sector, the Transportation and Warehousing sector, and the Utilities sector. The Wholesale Trade sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The merchandise described in this sector includes the outputs of agriculture, mining, manufacturing, and certain information industries, such as publishing.

The wholesaling process is an intermediate step in the distribution of merchandise. Wholesalers are organized to sell or arrange the purchase or sale of (a) goods for resale, (b) capital or durable non-consumer goods, and (c) raw and intermediate materials and supplies used in production. Wholesalers sell merchandise to other businesses and normally operate from a warehouse or office.

The Retail Trade sector comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The retailing process is the final step in the distribution of merchandise; retailers are, therefore, organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers: store and non-store retailers.

The Transportation and Warehousing sector includes industries providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation. Establishments in these industries use transportation equipment or transportation related facilities as a productive asset. The type of equipment depends on the mode of transportation. The modes of transportation are air, rail, water, road, and pipeline.

The Utilities sector comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal. Within this sector, the specific activities associated with the utility services provided vary by utility: electric power includes generation, transmission, and distribution; natural gas includes distribution; steam supply includes provision and/or distribution; water supply includes treatment and distribution; and sewage removal includes collection, treatment, and disposal of waste through sewer systems and sewage treatment facilities.

TARGET INDUSTRY – MANUFACTURING

Location	Establishments	September Employment	Average Weekly Wage	Employment LQ	Total Wage LQ
Cameron	220	6,053	\$954	0.50	0.62
Jim Hogg	5	49	\$744	0.34	0.28
Hidalgo	319	6,791	\$803	0.30	0.30
Willacy	5	77	\$938	0.22	0.23
Zapata	6	29	\$2,075	0.10	0.18
Webb	87	749	\$794	0.08	0.08
Starr	11	58	\$441	0.05	0.03

ONE YEAR EMPLOYMENT GAIN 2018-2019 - THOSE COUNTIES WITH HIGHER THAN STATE GROWTH HIGHLIGHTED

Location	Establishments	Employment	Gain/Loss Percent
Texas	25,567	908,144	2.5%
Cameron	220	6,053	9.6%
Jim Hogg	5	49	6.5%
Willacy	5	77	71.1%
Webb	87	749	17.4%
Starr	11	58	9.4%

The Manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. Establishments in the Manufacturing sector are often described



as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment. However, establishments that transform materials or substances into new products by hand or in the worker’s home and those engaged in selling to the general public products made on the same premises from which they are sold, such as bakeries, candy stores, and custom tailors, may also be included in this sector. Manufacturing establishments may process materials or may contract with other establishments to process their materials for them. Both types of establishments are included in manufacturing.

TARGET INDUSTRY – EDUCATION AND HEALTH SERVICES

Location	Establishments	September Employment	Average Weekly Wage	Employment LQ	Total Wage LQ
Starr	112	5,248	\$297	2.28	1.20
Hidalgo	2,345	78,993	\$565	1.92	1.74
Cameron	1,070	41,620	\$557	1.89	1.75
Jim Hogg	9	459	\$329	1.75	0.82
Webb	566	17,339	\$538	1.08	0.88
Willacy	30	541	\$703	0.87	0.91
Zapata	20	361	\$409	0.68	0.29

ONE YEAR EMPLOYMENT GAIN 2018-2019 - THOSE COUNTIES WITH HIGHER THAN STATE GROWTH HIGHLIGHTED

Location	Establishments	Employment	Gain/Loss Percent
Texas	93,993	1,692,144	2.4%
Hidalgo	2,345	78,993	5.7%
Cameron	1,070	41,620	5.8%
Webb	566	17,339	3.5%
Willacy	30	541	44.7%

The education and health services supersector consists of the Educational Services sector and Health Care and Social Assistance sector. The Educational Services sector comprises establishments that provide instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers. These establishments may be privately owned and operated for profit or not for profit, or they may be publicly owned and operated.

The Health Care and Social Assistance sector comprises establishments providing health care and social assistance for individuals. The sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities.

TARGET INDUSTRY – LEISURE AND HOSPITALITY

Location	Establishments	September Employment	Average Weekly Wage	Employment LQ	Total Wage LQ
Cameron	799	16,566	\$347	1.05	1.27
Webb	497	11,508	\$315	1.00	0.99
Willacy	30	410	\$331	0.92	0.96
Hidalgo	1,250	26,876	\$338	0.91	1.01
Zapata	26	205	\$260	0.54	0.32
Starr	66	847	\$329	0.51	0.62
Jim Hogg	17	88	\$351	0.47	0.48



ONE YEAR EMPLOYMENT GAIN 2018-2019 - THOSE COUNTIES WITH HIGHER THAN STATE GROWTH HIGHLIGHTED

Location	Establishments	Employment	Gain/Loss Percent
Texas	64,939	1,400,548	3%
Cameron	799	16,566	5.4%
Hidalgo	1,250	26,876	6.2%
Starr	66	847	7.9%
Jim Hogg	17	88	11.4%

The leisure and hospitality consists of the Arts, Entertainment, and Recreation sector and the Accommodation and Food Services sector. The Arts, Entertainment, and Recreation sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. This sector comprises (1) establishments that are involved in producing, promoting, or participating in live performances, events, or exhibits intended for public viewing; (2) establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and (3) establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby, and leisure-time interests.

The Accommodation and Food Services sector comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption. The sector includes both accommodation and food services establishments because the two activities are often combined at the same establishment.

TARGET INDUSTRY – NATURAL RESOURCES AND MINING

Location	Establishments	September Employment	Average Weekly Wage	Employment LQ	Total Wage LQ
Zapata	23	1,030	\$1,588	21.96	34.23
Willacy	64	391	\$683	7.15	6.41
Jim Hogg	20	102	\$1,325	4.41	7.18
Webb	102	2,044	\$1,528	1.45	3.07
Starr	20	220	\$1,149	1.08	1.99
Hidalgo	346	3,653	\$1,029	1.01	1.48
Cameron	165	704	\$659	0.36	0.35

ONE YEAR EMPLOYMENT GAIN 2018-2019 - THOSE COUNTIES WITH HIGHER THAN STATE GROWTH HIGHLIGHTED

Location	Establishments	Employment	Gain/Loss Percent
Texas	19,849	303,341	-1.9%
Willacy	64	391	23.3%
Jim Hogg	20	102	6.3%
Cameron	165	704	-0.1%

The natural resources and mining supersector consists of the Agriculture, Forestry, Fishing and Hunting sector as well as the Mining sector. The Agriculture, Forestry, Fishing and Hunting sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, and harvesting fish and other animals from a farm, ranch, or their natural habitats. The establishments in this sector are often described as farms, ranches, dairies, greenhouses, nurseries, orchards, or hatcheries.

The Mining sector comprises establishments that extract naturally occurring mineral solids, such as coal and ores; liquid minerals, such as crude petroleum; and gases, such as natural gas. The term mining is used in the broad sense to include quarrying, well operations, beneficiating (e.g., crushing, screening, washing, and flotation), and other preparation customarily performed at the mine site, or as a part of mining activity.



TARGET INDUSTRY – PROFESSIONAL AND BUSINESS SERVICES

Location	Establishments	September Employment	Average Weekly Wage	Employment LQ	Total Wage LQ
Willacy	24	580	\$851	1.01	0.83
Webb	683	9,998	\$568	0.68	0.41
Cameron	781	11,785	\$601	0.58	0.40
Hidalgo	1,523	16,607	\$696	0.44	0.34
Starr	58	257	\$609	0.12	0.09
Zapata	10	27	\$747	0.06	0.03
Jim Hogg	1	0	\$0	0.00	0.00

ONE YEAR EMPLOYMENT GAIN 2018-2019 - THOSE COUNTIES WITH HIGHER THAN STATE GROWTH HIGHLIGHTED

Location	Establishments	Employment	Gain/Loss Percent
Texas	139,296	1,802,037	3%
Willacy	24	580	43.9%
Zapata	10	27	12.5%

The professional and business services sector consists of these sectors the Professional, Scientific, and Technical Services sector, the Management of Companies and Enterprises sector, and the Administrative and Support and Waste Management and Remediation Services sector. The Professional, Scientific, and Technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. Activities performed include: legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, scientific, and technical services.

The Management of Companies and Enterprises sector comprises (1) establishments that hold the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing management decisions or (2) establishments (except government establishments) that administer, oversee, and manage establishments of the company or enterprise and that normally undertake the strategic or organizational planning and decision making role of the company or enterprise.

The Administrative and Support and Waste Management and Remediation Services sector comprises establishments performing routine support activities for the day-to-day operations of other organizations. Activities performed include: office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services.



MAJOR EMPLOYERS

SIGNIFICANT BUSINESSES, EXCLUDING RETAIL, MEDICAL FACILITIES, EDUCATION AND GOVERNMENT ENTITIES

Cameron County

Name	Employee Count	Description
Keppel Amfels	1,000	Fabricated Metal Product Manufacturing
Trico Products	720	Transportation Equipment Manufacturing
Worldwide Digital	700	Computer And Electronic Product Manufacturing
ORC Industries	450	Apparel Manufacturing
Solar Turbines	400	Machinery Manufacturing
Cumsa Corp Distribution	400	Merchant Wholesalers, Durable Goods
Texas Pack Inc.	300	Warehousing And Storage
Rich Products Corp.	263	Food Manufacturing
IBC-Brownsville	250	Credit Intermediation And Related Activities
United Launch Alliance LLC	240	Aerospace
Teleperformance USA	229	Administrative And Support Services

Hidalgo County

Name	Employee Count	Description
Ticketmaster	600	Administrative And Support Services
Pictsweet Co.	450	Food Manufacturing
Airtex Products	400	Transportation Equipment Manufacturing
BBVA Compass	400	Credit Intermediation And Related Activities
Lineage Logistics	350	General Management Consulting Services
Wells Manufacturing De Mexico	300	Miscellaneous Manufacturing
Logicorp Logistics Group	300	Support Activities For Transportation
J & D Produce Inc.	275	Merchant Wholesalers, Nondurable Goods
Aim Media Texas LLC	251	Professional, Scientific, And Technical Services
Coca-Cola Bottling Company	250	Beverage and Tobacco Manufacturing

Jim Hogg County

Name	Employee Count	Description
Katco Vacuum Truck Services Inc	35	Specialty Trade Contractors
Lone Star Sales	25	Specialty Trade Contractors
First National Bank-Hebbronville	24	Credit Intermediation And Related Activities
Kinder Morgan Inc.	20	Pipeline Transportation
Wright Materials Inc.	18	Merchant Wholesalers, Durable Goods
Escamilla Ford Inc.	15	Motor Vehicle And Parts Dealers
American Tower Corp	13	Telecommunications
Funeraria Del Angel	12	Personal And Laundry Services
Escamilla Chevrolet GMC	11	Motor Vehicle And Parts Dealers
Multi-Chem Group	11	Chemical Manufacturing



Starr County

Name	Employee Count	Description
Starr Camargo Bridge Co.	55	Support Activities For Transportation
Starr Feed Yards Inc.	55	Animal Production And Aquaculture
Payne Rio Chrysler Dodge Jeep	50	Motor Vehicle And Parts Dealers
Payne City Ford	32	Motor Vehicle And Parts Dealers
Citizens State Bank	30	Credit Intermediation And Related Activities
Rio Motor Co.	30	Motor Vehicle And Parts Dealers
Rainbow Express Taxi	20	Transit And Ground Passenger Transportation
Starr Appraisal District	16	Professional, Scientific, And Technical Services
Pirate's Fishing Pier	15	Scenic And Sightseeing Transportation
Starr Banking Center	15	Credit Intermediation And Related Activities

Webb County

Name	Employee Count	Description
Modine Manufacturing Co.	600	Miscellaneous Manufacturing
American National Insurance Co.	330	Insurance Carriers And Related Activities
International Bank of Commerce	250	Credit Intermediation And Related Activities
International Bancshares Corp.	250	Management Of Companies And Enterprises
Tanjore Corp Ltd.	250	Merchant Wholesalers, Durable Goods
Family Chevrolet	201	Repair And Maintenance
Anderson Columbia	200	Construction Of Buildings
Sames Motor Co.	200	Motor Vehicle And Parts Dealers
General Cable	188	Electrical Equipment, Appliance, Component Manufacturing
FedEx Freight	172	Truck Transportation

Willacy County

Name	Employee Count	Description
Wetegrove Charles & Co	200	Crop Production
VTCI	200	Specialty Trade Contractors
Valley Telephone Co-Op	200	Telecommunications
VTX Broadband	150	Professional, Scientific, And Technical Services
Cardines Ford	38	Motor Vehicle And Parts Dealers
Swanberg Farms Ptn	30	Crop Production
Willacy Cooperative	30	Merchant Wholesalers, Nondurable Goods
H&R Block	23	Professional, Scientific, And Technical Services
Warrington Brothers	22	Crop Production
J A P Farms Inc.	22	Crop Production

Zapata County

Name	Employee Count	Description
Med-Loz Lease Services Inc.	150	Support Activities For Mining
Texas Energy Services Inc.	120	Specialty Trade Contractors
Falcon Lake Nursing Home	40	Nursing And Residential Care Facilities
Key Energy Services	30	Specialty Trade Contractors
International Bank Of Commerce	22	Credit Intermediation And Related Activities
Zapata National Bank	21	Credit Intermediation And Related Activities
Zapata Bancshares Inc.	21	Management Of Companies And Enterprises
Roth Construction	20	Construction Of Buildings
Oil Field Services	20	Specialty Trade Contractors
Waste Management	20	Waste Management And Remediation Services



STAKEHOLDER PERSPECTIVES AND PRIORITIES

The following are survey responses from United States-based stakeholders in private business, government, education and in the economic development ecosystem of organizations.

ATTITUDES ON GROWTH

According to survey responses and conversations held with key stakeholders in the region, there is a healthy desire for growth in the region. This level of growth can be best defined as moderate growth, with a few respondents seeking aggressive growth. Growth overall is perceived to be somewhat to very positive, with very few respondents noting it was negative in any sense. Our viewpoint is that growth is welcomed in the region, as long as it is done intentionally.

ATTITUDES ON BUSINESS SUPPORT

Businesses generally feel supported in the region, but not overwhelmingly so. This may be the result of the consequences of the current COVID-19 global pandemic, creating additional challenges to businesses throughout the United States and this study region. Also, it should be noted that the deployment of business services by economic development, chamber and municipal entities nationwide is a difficult task, based on the number of businesses, the variety of solutions needed, and communication channel issues. Communities where businesses feel highly supported are typically served by economic development organizations and partners that focus a high percentage of their time and budget on business retention and expansion.

PERSPECTIVES ON ENTREPRENEURIAL AND START UP SUPPORT

By analyzing survey response and speaking with economic development, chamber, municipal, business and education partners in the region, it has been determined that entrepreneurs and start-up businesses are supported inconsistently in the region. Due to the sheer size of the region and diversity of service offerings by organizations in the ecosystem, there are gaps of support in this critical area of business development. An organizational assessment should be performed to fully understand the organizations and service offerings in the region. By doing so, resources can be defined, communicated to partners, and shared as appropriate. The demographics, industry mix and culture of the region suggest that entrepreneurial and start-up support would be of significant benefit.

CROSS-CUTTING INITIATIVES THE REGION WANTS TO SUPPORT

Economic development is a complex discipline, with competing priorities yet shared assets. To be successful as individual municipalities, jurisdictions and localities, competition is understood. Budgets, leadership positions and often elections are decided on the economic results that are accomplished within the boundaries of a municipality. It is natural and commonplace to not partner on certain aspects of the economic development spectrum.

Where there is interest to partner, you will discover initiatives that benefit the entire region, and not put anyone at a competitive disadvantage. Three areas discovered to be of priority from the survey and speaking with regional stakeholders include, by degree of interest:

- 1) A national/international marketing campaign to promote the region as a business destination, 2) Talent attraction, and 3) Additional training/education resources for the existing workforce in the region. These areas of priority align to the initiatives embraced by other regions in the United States, and should be considered significantly to advance the region as a whole through work product and financial membership support.



IDENTIFIED PRIORITIES OF ECONOMIC DEVELOPERS

Through surveying business professionals, government leaders, education partners and practitioners in the business development ecosystem, several priority areas were discovered. These priority areas were validated by phone interviews of the same stakeholder groups, and align to the strategies of other regional organizations across the United States. Based on best practices, survey response and stakeholder interviews, economic developers should focus their energies in the following areas, listed by most important to least important:

1) Growing existing business, 2) Recruiting new domestic business, 3) Recruiting new international business, 4) Supporting local entrepreneurs, and 5) Training and upskilling the talent base

It should be noted that this delivery of services does not have to be provided by all partners, but ideally as a collective of organizations serving the individual locations in the region. By identifying organizations and service offerings, coverage and gaps can be identified and challenges can be resolved. However, with the goal to amplify one regional organization to deliver a broader spectrum of services (which is a need that has been identified) these areas must be covered in-house, as well as through partners, to be effective.

PRIORITIES OF THE REGION, OUTSIDE OF BUSINESS DEVELOPMENT

To be successful, traditional economic development practices of business retention, expansion and recruitment need to be balanced with longer-term, “table setting” initiatives to create environments for success outside of the project-level activities. Aspirational goals allow economic developers to work towards outcomes through local and regional initiatives. At the regional level, respondents noted three areas most significantly, including:

1) A region that offers high-achieving educational options from Pre-K through community/technical college level, 2) A region with vibrant downtowns and neighborhoods that attract young business leaders and families, and 3) A diversified economic base that creates new higher-paying jobs. The prioritization of education, talent development, placemaking and creating higher quality jobs through diversifying the economy is in line with other regional groups in the United States and shows a sophistication of economic development strategies by the region. Support for these areas of regional prioritization will likely come easily from the stakeholder groups.

PERSPECTIVES ON LEGISLATIVE ENVIRONMENT ENABLING BUSINESS SUCCESS

Survey respondents were mixed on the nature of the legislative environment, with many respondents generally favorable to the environment, with others providing specific criticism to an individual location or project. At the regional and state level, the environment is perceived to be overall positive and good for business. Some insights to pursue as a result of this research include: 1) Does this region receive equitable support from the State of Texas?, 2) Is there anti-Mexico sentiment at any level, and how does that affect businesses in the region?, 3) Are there enough tools (including incentives) that can assist in business expansion, especially in light of the recent COVID-19 economic slowdown? These questions are a result of sentiment expressed in the survey responses.

PERSPECTIVES ON REGULATORY ENVIRONMENT ENABLING BUSINESS SUCCESS

Survey respondents were generally favorable on the regulatory environment in their particular environment, and understand its role in business.



COVID-19 IMPRESSION AND NEXT STEPS

The affects of the global slowdown will be experienced for many years to come, with outcomes yet to be fully determined. Initial discoveries conclude that local business services provided by economic development organizations will be paramount as the economy emerges. Current projections reveal that a high percent of businesses, especially in retail, will not recover from this unique occurrence. Economic developers, chambers and partner organizations should focus on services to assist in the stabilization and recovery of the local business base, rent mitigation, talent support and rehiring, grant/loan facilitation, marketing, business development, the re-purposing of real estate to new uses, as well as new services to be created based on the needs of the location.

Through phone calls with business leaders in the region and survey response review, there is a unanimous perspective that business will change, with a tone of uncertainty and worry. A call for adaptive leadership and strategies is requested, and aligns to our perspective that communities that are resourceful, listen to their constituents and develop solutions to assist local business will emerge more quickly. Respondents cite entirely unique solutions they are creating to stay in business and recover from this crisis, so economic developers should consider strategic outreach to primary business, providing nimble, adaptive and relevant response to needs.

Outside of the COVID-19 challenges, a more significant delivery of business retention/expansion services was discovered. With this current state of the economy, it is needed more than ever.

A perspective on business development deals and the effects to the manufacturing industry have been published in the economic development community. In a recent study through Consultants Connect, a group of North America's Site Consultants report that 52% of deals have come to a halt, and feel 70% of those projects will come back once restrictions are lifted. A total of 70% of consultants surveyed feel that significant onshoring will start to happen as a result of COVID-19.

PERSPECTIVES AND PRIORITIES - MEXICO-BASED BUSINESSES

Though limited in the number of responses, there are interesting takeaways in the perspectives and priorities from leaders in Mexico. Much like U.S.-based responses, strengths are seen in manufacturing and logistics, and connectivity between the two countries drives commerce in the form of trade, retail and tourism experiences. The region's strategic location between countries and low cost of labor is also a shared perspective. Challenges to the region run the spectrum from lack of access to capital, poor infrastructure, limited number of employers, taxes, poor quality of life, and are so varied that no consensus or discovery can be confidently made with such a low sample size.

Industries that leaders would like to see further promoted and supported include energy (petroleum and clean), manufacturing (automotive and pharmaceutical) and industries that can leverage ports. A lack of workforce availability is confirmed in survey respondents, with low education levels cited as a reason. Infrastructure is seen as both an asset and an area where more attention is needed. Surprisingly, a larger percentage of businesses reported that they do not import/export, a data point that should be further explored.

When describing positive characteristics of the region, business opportunities, health and available education are mentioned. The appetite for growth ranges from moderate to aggressive growth. It is more common for leaders to feel companies are not well-supported in the region, offering an area to further pursue with additional research. Much like the U.S. response, support for entrepreneurs yielded a mixed response. Common to the response in the U.S., respondents see value in a national/international marketing campaign, talent development and additional training/education resources. Economic development professionals should focus on recruiting new domestic and international business, grow existing business, and encourage foreign direct investment. Low unemployment, a region with vibrant downtowns to attract business leaders and a region that offers education opportunities is a desired outcome of economic development efforts.



RELATIVE COMPETITIVE SUMMARY

When defining the overall competitiveness of this region, it's important to recognize the significant geographic size of this study area and the varying degrees of competitive strengths/challenges spread across the region. Outside of regional efforts where this summary of collective assets is relevant (such as a national/international marketing campaign), a competitive summary should be performed at the local level as economic development is typically delivered in smaller, more defined areas with specific advantages and challenges.

This region offers unique business development opportunities unlike any other place due to its strategic location between the countries of the United States and Mexico. This interplay between workforce, customers and businesses delivers a competitive advantage in labor costs, consumer spending and the creation of goods and services. An overall young workforce delivers a pipeline of talent within and approaching prime working age, unlike other areas of the country that are seeing an aging workforce and shortage of workers. Land is available, as well as a reasonable inventory of commercial real estate.

Access to utilities including energy and fiber can vary throughout the region, though costs are reasonable. Housing is generally available and low cost compared to national benchmarks, though high-quality multi-family units are in short supply. The State of Texas is generally pro-business, as is the region. Domestic migration to southern states for moderate climates and friendlier tax environments makes this region attractive for workers and consumers.

REGIONAL POSITIONING RECOMMENDATION

This dynamic region is positioned between two countries that share values of determination and fortitude. By working more closely together, that history can enable an incredible future... one of opportunity, advancement and prosperity for all.

The can-do spirit among this diverse population drives innovation and invention through the creation of products, movement of goods, harnessing of energy, growth of nourishment, offering of care, and compassion towards one another. The Rise of the Region is more than a clever tagline. Here, two countries come together to deliver a robust regional workforce, global trade opportunities, unparalleled buying power, strong business relationships, connected infrastructure, big ideas and orchestrated collaboration.

Today's region is authentic and human. Together, leaders in business, education, training, government and the resident population are motivated and inspired to do more, be more and experience more. This is a special place, a place of warmth not only in climate but in personality. It's colorful, energetic and alive. From vast natural settings over land and water to urban areas that serve as places of building, moving and serving, this unique place in North America is ready for the world.

Discover the magic that awaits, in promise and people. Find your purpose and unleash your prosperity where cultures not only come together, but accomplish together. It's the perfect time to rise together.



APPENDIX A: STATE OF TEXAS AND PARTNER RESOURCES

State of Texas and Partner Resources

Office of the Governor Resources

Small Business:

<https://gov.texas.gov/business/page/small-business-programs>

Texas Startup Directory:

<https://gov.texas.gov/uploads/files/business/TXStartupDirectory.pdf>

Studies:

<https://gov.texas.gov/business/page/reports-and-publications>

Business Permit Office:

<https://gov.texas.gov/business/page/business-permits-office>

International:

<https://gov.texas.gov/business/page/foreign-direct-investment>

BusinessEvents:

<https://gov.texas.gov/business/events>

Incentive Programs:

<https://gov.texas.gov/business/page/incentives>

Texas Film Commission:

<https://gov.texas.gov/film>

Texas Music Office:

<https://gov.texas.gov/music>

Travel Texas:

<https://www.traveltexas.com/>

Local Small Business Resources

Consulting

SCORE:

<https://riograndevalley.score.org/about-us-42>

Small Business Development Center (SBDC):

<https://www.utrgv.edu/sbdc/>

Procurement Technical Assistance Center (PTAC):

<https://www.utrgv.edu/ptac/>

Small Business Administration (SBA):

<https://www.sba.gov/offices/district/tx/harlingen>

Texas Veteran's Commission:

<https://www.tvc.texas.gov/entrepreneurs/>

Veteran Business Outreach Center (VBOC):

<https://www.utrgv.edu/vboc/>

Women's Business Center (WBC):

<https://www.wbc-cc.com/>

Legal

State Bar of Texas:

<https://www.texasbar.com>

Rio Grande Legal Aid:

<http://www.trla.org/>

TWC Legal Hotline:

512-475-2670

<https://twc.texas.gov/jobseekers/employee-rights-laws>

Small Business Finance:

LiftFund:

www.liftfund.com

PeopleFund:

www.peoplefund.org

BCL of Texas:

<https://bcloftexas.org/>

ACCION:

<https://us.accion.org/small-business-loans/>

SBA Lender Match:

<https://www.sba.gov/funding-programs/loans/lender-match>

Grants

Federal grant opportunities:

www.grant.gov

Skills for Small Business:

<https://twc.texas.gov/businesses/skills-small-business-employers>



APPENDIX B: ECONOMIC DEVELOPMENT ECOSYSTEM

Significant Economic Development Organizations in the Study Area

McAllen Economic Development Corporation - www.mcallenedc.org

Mission:

To create jobs and generate revenue for the residents of McAllen, Texas.

Vision:

To be a vibrant center of innovation and economic prosperity to create tomorrow's opportunities.

Target Industries:

- Automotive Manufacturing
- Aerospace
- Advanced Manufacturing
- Medical Research
- Data Centers
- Cold Storage and Food Processing
- Customer Contact Centers

Strengths Promoted:

- Third Coast
- Trade Agreements (Including NAFTA)
- Infrastructure (Interstates, Airports, International Bridges, Rail Roads, Sea Ports)
- Talent (Large, Young, Continually Growing Labor Pool)
- Cost of doing business
- Utility Cost
- Quality of Life
- Safety
- Climate
- Incentives
- Markets
- Business Friendly

Harlingen Economic Development Corporation - www.harlingenedc.com

Mission:

The Harlingen EDC serves as the primary spark plug for the economic development engine in Harlingen.

Target Industries:

- Aerospace
- Logistics and Distribution
- Industrial and Automotive Supply
- Healthcare Industry

Strengths Promoted:

- Business Climate
- Location
- Incentives
- Tax Structure



- Key Industries
- Workforce
- International Opportunities
- Infrastructure
- Low Cost of Living

Greater Brownsville Incentives Corporation - www.greaterbrownsville.com

About:

The Greater Brownsville Incentives Corporation (GBIC) is a publicly-funded organization created in 1992 to help companies establish or expand operations in the Brownsville area. To strengthen the local economy, they work with the community to support local business owners, entrepreneurs, and startups. They offer new and existing companies the financial, job training, and site location assistance required to be successful in Brownsville. The GBIC provides assistance with development into the region by guiding prospective firms through the process of identifying potential suppliers and making a connection with appropriate community leaders and other business.

Target Industries:

- Advanced Industries
- Heavy Industries
- Healthcare
- Food and Beverage
- Retail, Hospitality and Tourism

Strengths Promoted:

- Incentive Programs
- Strengths in Target Industries
- Logistics & Infrastructure
- Brownsville Borderplex – SpaceX Highlight
- Quality of Life
- Workforce and Education

Mission EDC - www.missionedc.com

About:

The Mission Economic Development Corporation is dedicated to creating a workforce with 21st century skills and a first class environment for conducting business recruitment, retention, and expansion while maintaining a steadfast focus on quality of life for the citizens of Mission.

Mission EDC, a component of the City of Mission, Texas, is tasked with creating jobs, attracting capital investment, improving the quality of life and strengthening the workforce in Mission, Texas. Mission EDC accomplishes its task by focusing in five areas: Entrepreneurship and STEAM Education, Business Expansion and Retention, Recruitment, Infrastructure and Transportation and Quality of Life. Mission, Texas occupies the western portion of the McAllen MSA... the fastest growing MSA's in Texas. In addition to the 1 million inhabitants on the American side of the Rio Grande River, Mission, Texas is just minutes north of the 2 million residents of Reynosa and Matamoros, popular manufacturing centers in Northern Mexico.

Target Industries:

- Connecting Entrepreneurs with necessary assets
- High-growth technology and knowledge-based businesses
- Retail recruitment
- Industrial base growth

Strengths Promoted:

- Infrastructure & Transportation
- Quality of Life
- Programs – Downtown and Scholarship Initiatives



San Benito Economic Development Corporation - www.sanbenitoedc.us

Mission:

To promote, support and foster economic development within the San Benito community through new industry recruitment, business retention and expansion, business innovation, new business startups and entrepreneurship.

Vision:

To work collaboratively with the San Benito's leadership for the purpose of creating a vibrant, innovative and diversified city of choice for the City of San Benito's visitors and residents.

Target Industries:

- Industrial and Retail

Strengths Promoted:

- Available Real Estate
- San Benito Industrial Park
- Southside Park
- Restaurant and Retail Development

San Juan EDC - www.sanjuanedc.com

Mission:

San Juan Economic Development Corporation's mission is to create wealth through new investments and expansion of existing businesses for the development of more quality job opportunities.

Target Industries:

- High-end, luxury commercial retail development
- Tourism

Strengths Promoted:

- Strategic Location
- Large regional population
- Cross-border commerce
- Small business assistance
- Incentives and grants
- Available real estate

Rio Grande City EDC - www.rgcedc.com

About:

We're committed to helping you start, grow or relocate your business to Rio Grande City. From locating sites, to navigating the permitting process, to connecting you with necessary resources, we're serious about supporting business development in Rio Grande City.

Target Industries:

- Start ups
- Veteran businesses
- Downtown / Main Street
- Retail



Strengths Promoted:

- Infrastructure – International port, railway, airport, nearby interstate and deep water sea-port
- World-class research university
- Dynamic, young workforce
- Low cost-of-living
- Strategic location
- Weather

Roma EDC - www.cityofroma.net/roma-economic-development-corporation.html

About:

The Roma Economic Development Corporation (EDC) was created by the voters in 1995 to enhance the quality of life in Roma by advancing the investment, development, growth and relocation of companies within the area. Over the years, the Roma EDC has evolved into an important funding source for projects driving economic and community development including land acquisition for the Roma Fire Department and the Roma Transit Station, redevelopment initiatives in the historic district, and multiple park improvements.

Target Industries:

- Start ups
- Veteran businesses
- Downtown / Main Street
- Retail

Lower Rio Grande Valley Development Council - www.lrgvdc.org/business.html

About:

The LRGVDC promotes cooperation among local units of government and provides forums and opportunities for them to work with economic interests and citizen groups in order to improve the region's health, safety, and general welfare and to plan for future development.

Key Programs:

- Economic Development (EDA Planning Grant Administration including Public Works and Economic Development Program, Economic Adjustment Assistance Program, Local Technical Assistance, Planning Program, University Center Economic Development Program)
- Pace program
- Solid Waste
- Water resources
- Community development
- Fair Housing
- Disaster Recovery Funding

Rio South Texas Economic Council - www.riosouthtexas.com

Target Industries:

- Aerospace
- Automotive
- Energy
- Electronics
- Business Services
- Destination Retail

Strengths Promoted:

- Young population of 3.5 million people, slightly less than 1.5 Million of which reside off the northern riverbank in the U.S., and over 2 Million who call the southern riverbank in Mexico home.
- Multi-modal infrastructure in form of bridges, interstate highway connectivity, commercial rail service, multiple airports, access to the Gulf Intercoastal Waterway, a deep-water sea port, cross-border pipelines, and coming soon, a SpaceX launch facility
- Strategic location on the U.S.-Mexico Border
- Access to each country's cost benefits, the region's Free Trade Zones, as well as markets around the world through free trade agreements with 56 countries



RGV Partnership - www.rgvpartnership.com

Mission:

To be the catalyst for prosperity in the Rio Grande Valley.

Vision:

We drive advancement in the Rio Grande Valley by unifying stakeholders in the spirit of collaboration and regional progress, and by being an influential advocate for the region.

Target Industries:

- Industrial and Retail

Key Areas of Impact:

- Transportation
- Education
- Economy
- Government
- Healthcare

Education and Talent Partners

RGV Lead - www.rgvlead.org

About:

Rio Grande Valley Linking Economic and Academic Development (RGV LEAD) develops and manages collaborative projects that bring employers and educators together to help students set and achieve college-and-career goals.

Helping students set and achieve college-and-career goals impacts individual lives and in a greater sense also impacts the Valley's decades long struggle with low educational levels. Since 1992, RGV LEAD, a Texas nonprofit and federal 501c3 organization, and its partners have implemented initiatives that have become a vital part of a regional effort to improve the Valley's educational levels.

Working as the project manager for regional joint ventures, RGV LEAD manages collaborative projects such as educator externships, and student internships. RGV LEAD's partners include school districts, colleges and universities, the regional education service center, economic development organizations, workforce development boards, and others. Educational institutions support RGV LEAD because its projects have helped to improve graduation and college enrollment rates. Economic development organizations support RGV LEAD because its initiatives address the Valley's long standing need for an educated, skilled workforce.

Starr County Industrial Foundation - www.starrcounty.org

About:

The Starr County Industrial Foundation (SCIF) is a non-profit organization founded and supported by local government and business leaders that are committed to further develop and diversify the local economy through sound, controlled economic growth. Over the years SCIF has developed a core competency in a varied spectrum of administrative and promotion roles which has placed it in a position to capitalize industrial and economical development in the Starr County region.

Services:

- Advise companies about our market and potential opportunities
- Assist corporations in finding office space or land sites
- Serve as an advocate to simplify the process of working with local governments
- Connect companies with influential business and community leaders
- Create strategic initiatives to support growth in specific industry sectors
- Identify potential financial incentives and cost-saving programs
- Energizing Business - Enriching Neighborhoods - Promoting Advocacy
- Fostering Training and Education - Strengthening Infrastructure
- Developing Skilled Workforce



Chambers of Commerce

Alamo Chamber of Commerce – www.alamochamber.com

Promotes:

- Located in the Rio Grande Valley, an area nicknamed the “Land of Two Summers”
- Great location for new industries and ideal for tourism and winter visitors
- Close to major shopping areas, including Mexico
- For the nature enthusiast, it is situated near the popular Santa Ana National Wildlife Refuge

Alton Chamber of Commerce – www.alton-tx.gov/chamber-of-commerce

Promotes:

- Positive business environment
- Community, with a strong connection between the faith-based, political, social and educational service-driven organizations
- Educational, social, entrepreneurial and other important resources for living in Alton

Brownsville Chamber of Commerce – www.brownvillechamber.com

Promotes:

- Strategic location where the Rio Grande and the Gulf of Mexico meet
- Only Texas border city with a deepwater port
- Ideal location for the logistics and transportation cluster
- Fast-growing manufacturing location with solid infrastructure, resources, a young and skilled workforce on both sides of the border, and low labor costs
- Dynamic hub for international trade with its sister city just across the border, Matamoros, Tamaulipas

Edinburg Chamber Commerce - www.edinburg.com

Promotes:

- Formal introductions to the community
- Marketing, customer service and expansion expertise
- Locations to eat and stay

Greater Mission Chamber of Commerce - www.missionchamber.com

Promotes:

- Strategic location, right in the heart of the Rio Grande Valley, about 250 miles south of San Antonio
- Year-round tropical weather that's not too hot, and never too cold
- Amazing tourist attractions nearby and must-see historical markers
- Outdoor recreational activities such as kayaking, canoeing, biking, four premier golf courses, and world-class nature attractions
- Opportunities for businesses, large and small, plus entrepreneurs
- Working to become an international destination for thriving commerce, tourism, and development

Harlingen Chamber – www.harlingen.com

Promotes:

- Creating a business-friendly environment
- Access to more than 1,000 potential business leads, including more than 25,000 area employees
- Business development programs
- Leadership development
- Advocacy through a Government Affairs division

La Feria Chamber Of Commerce – www.laferiachamber.com

Promotes:

- Advancing the commercial, industrial, civic and general interests of the La Feria community and working in harmony with the area for that same purpose, including promoting the common economic interests of commercial enterprises in the community, improving the business conditions in the community and providing services to aid in economic development in the community.
- Organizing and directing the energies of those who believe that La Feria is a community worth living in and a community worth improving



Los Fresnos Chamber of Commerce – www.losfresnoschamber.com

Promotes:

- Business assistance in the market area, including promoting, announcing, and advertising
- Social and cultural events to enhance the welfare and prosperity of the community

McAllen Chamber Of Commerce - www.mcallen.org

Promotes:

- Sales, business development and networking opportunities
- Business exposure
- Professional development
- Volunteer opportunities
- SizeUp LBI (Local Business Intelligence) to benchmark business against the competition, locate the best areas to advertise, and research the demographics, consumer spending and labor force a unique business location
- Innovation programs including 14 programs to drive innovation and sustain startups and entrepreneurs
- Market profile information to base business decisions upon

Mercedes Chamber Of Commerce – www.mercedeschamber.com

Promotes:

- Information on area businesses, population demographics, our school system, and other important information
- Public relations including announcements for business openings, expansions, anniversaries, relocations, and other events
- Business referrals
- Educational and professional information to transform how business is done

Palmview Chamber of Commerce – www.palmviewchamber.com

Promotes:

- An economic climate that strengthens the competitiveness of Palmview businesses and benefits citizens of the city and its surrounding areas
- Services members want, including resources on matters affecting companies of all sizes
- Advocate efforts for business with government in the City of Palmview and the State of Texas

Port Isabel Chamber Of Commerce - www.portisabelchamber.com

Promotes:

- Business, community growth and development of the City of Port Isabel
- Advancing the general welfare and prosperity of the City of Port Isabel so that its citizens and its business community shall prosper
- Programs of a civic, social and cultural nature which are designed to increase the functional and aesthetic values of the community
- The preservation of the competitive enterprise system of business

Port Mansfield Chamber of Commerce – www.portmansfieldchamberofcommerce.com

Promotes:

- Information and advertisements for members and member services
- Tourism information
- Event Calendar and Pavilion / Town Activities

Raymondville Chamber Of Commerce – www.raymondvillechamberofcommerce.weebly.com

Promotes:

- Attracting new businesses, promoting existing businesses, creating tourism promotion and assisting with economic development in Raymondville and Willacy County
- Relocation information, business networking and quality of life projects
- Support for city and county projects by embracing opportunities to work with the local leadership
- Business development opportunities including monthly workshops, seminars and networking breakfasts



RGV Hispanic Chamber of Commerce – www.rgvhcc.org

Promotes:

- Economic development and business assistance to the Hispanic market through networking, promoting education and nurturing leadership
- Financial assistance and guidance through in-house satellite offices of SBA, UTPA-SBDC, and Acción Texas
- Service to the growing small business community all along the South Texas border
- Bilingual resources through partnerships with government and local agencies as well as UTRGV to those who wish to open a new business or expand their current endeavors
- Programs focused on starting new businesses and expanding existing businesses, including minorities and women-owned small businesses
- The value of the Hispanic market to businesses
- Strong government relations, international trade opportunities and economic development

San Benito Chamber Of Commerce – www.chamberofsanbenito.com

Promotes:

- Solutions that foster, enable, and facilitate the success of San Benito businesses, so our community is financially healthy and the people living, working, and playing in San Benito can enjoy a high quality of life
- A “go to” resource for advocacy, education, and resources for San Benito businesses and for the San
- Programs that ideally are so relevant, pertinent, and “business cool” that members feel that the programs are events “that can’t be missed” and “can’t live without.” Programs are developed to be integral to their financial and organizational success.

South Padre Chamber Of Commerce – www.spichamber.com

Promotes:

- Services to advance the business interests of its members making South Padre Island a premier location to live, work, vacation, and do business
- Significant marketing opportunities for Chamber business members
- Legislative services to protect and promote the business environment by keeping a close eye on ordinances and legislation that impact business and tourism
- Educational opportunities for area high school students
- Workforce education and development efforts, customer service seminars, hospitality training programs, swimming pool certification programs and food handling certification programs

Weslaco Chamber Of Commerce – www.weslaco.com

Promotes:

- Strength in attracting the greatest number of members, creating a pool of resources for ideas, energy and finances
- A coalition committed to building a healthy economy and improving the quality of life within the local community
- Things to do and see, tourism itineraries
- Information on demographics (population, transportation, utilities, taxes), government, education, and healthcare
- Business start-up services (<https://www.weslaco.com/business-startup-guide/>)



Tourism Partners

Experience Edinburg – www.experienceedinburg.com

Promotes:

- Exceptional entertainment, arts & culture, recreation and education
- A community with a vibrant culture
- The largest indoor venue in South Texas, the Bert Ogden Arena
- Outdoor recreation with many parks, trails, as well as the Edinburg Scenic Wetlands & World Birding Center.
- Opportunities to learn about South Texas culture at the Museum of South Texas History
- Authentic food & drink from a variety of dine-in restaurants
- Festivals including the South Texas Film Festival, FridaFest, Edinburg Music Fest, and the Night of Lights Parade, among others
- Education opportunities including The University of Texas Rio Grande Valley, home to a new school of medicine

Harlingen CVB - www.visitharlingentexas.com

Promotes:

- Conveniently located at the center of the Rio Grande Valley which makes it the perfect destination to relax and take in the area activities
- Events, with an easy-to-navigate calendar
- Things to do (Shopping, Birding, Golfing, Fishing & Hunting, Trails & Parks, The Beach)
- Hotels

Texas Birding – www.texasbirding.org

Promotes:

- Unique birding experiences you won't find anywhere else
- A climate in Southeast Texas that supports a rich assortment of woodland bird species
- Comfortable places to stay and restaurants featuring different cuisines

South Texas Tourism – www.southtexas tourism.com

Promotes:

- The premier location for a happy and healthy retirement
- A natural paradise to spend the winter in the sun
- Low cost of living, warm weather, the friendliness of people, medical resources and volunteer and educational opportunities
- Cultural resources, diversity and natural habitat
- Outdoor activities including golf, fresh/salt water fishing, sunset cruises, dolphin and bird watching cruises
- Cultural festivals, local music and unique culinary traditions of Tex- Mex cuisine
- Affordability of prescription medicine and medical services
- A safe and tourist friendly town full of live music, affordable all day Happy Hour atmosphere, and English speaking customer service
- Outstanding healthcare and first rate hospitals
- History, culture and nature