

Report 2020

Greater Fort Bend EDC
One Fluor Daniel Drive
Sugar Land
Fort Bend County
Texas, 77478

www.fortbendcounty.com



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MESSAGE FROM THE CHAIRMAN

For 34 years, we have marched this county toward common purpose, uniting business and government to focus on building strong and resilient communities intent on quality growth, high education standards, and partnerships that deliver more together than any one entity could deliver individually.

In a nutshell, that synergy is the foundation of our success and continues to propel our County to national front runner status for population growth, average household income, high education attainment, low cost of living and overall attractiveness as a community.

These are challenging and interesting times. Our economy has been devastated by a worldwide pandemic, our nation has reawakened to the persistent inequalities in our imperfect union, and it seems that we are more politically divided than ever.

I have recently wondered what Herb Appel, the late founding president of this organization, would be saying if he were with us today. I recall that, about 25 years ago, Herb was the first person to actively embrace and promote the increasing diversity in our great county. Herb saw strength and promise where some saw reason for concern. If he were here today, I believe Herb would be telling us to listen more, learn more, be kind to everyone, and then work hard together to keep reaching for excellence in our community.

We will survive, we will do better and we will look back once again and realize that: we are stronger together than alone; there is common purpose in ensuring both government and business are equally supported through this time; and, focus on quality, value and affordability of services and products are timeless virtues we have in ample supply in Fort Bend County.

Thank you to all the members of the board, members of the organization, the executive committee and the staff of the organization for your continued unwavering commitment to quality growth of our community.

Les Newton
CHAIRMAN OF THE BOARD

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Tribute to a Leader

Greater Fort Bend EDC

One Fluor Daniel Drive Sugar Land
Fort Bend County
Texas

No of Employees
4

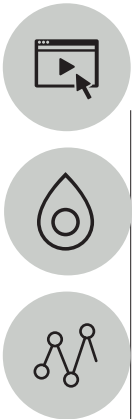
Fiscal Year
July 2019 - June 2020

Countywide Economic Development
Council 34 years of pursuing Excellence



MEET THE REST OF FBEDC'S EXECUTIVE COMMITTEE

The Executive Committee manages the business, affairs, and property of the corporation and possess all of the powers of the Board of Directors at any time that the board is not actually in session. The Executive Committee also reviews the work of the organization to determine the sufficiency, quality, quantity and consistency of the work performed to the purposes for which the organization is chartered.



STEVE ROBINSON OF COUNSEL

Steve Robinson is a Partner in the Law Firm of Allen Boone Humphries and Robinson and has served as Counsel since 2017.



JARED JAMESON VICE CHAIRMAN

Jared Jameson is President & Chief Financial Officer for WJ Interests Wealth Advisors and has served as Vice Chairman since 2017.



JEFF HALEY TREASURER

Jeff Haley is President & CEO of Si Environmental and has served as Treasurer since 2017.



DAN MCDONALD SECRETARY

Dan McDonald is President & CEO of McDonald & Wessendorff Insurance and has served as Secretary since 2017.



LINA SABOUNI ASSISTANT SECRETARY

Lina Sabouni is a Principal in the Architecture Firm AutoArch and has served as Assistant Secretary since 2019.



DANIEL WONG ASSISTANT TREASURER

Daniel Wong is founder, President and CEO of Tolunay-Wong Engineers, Inc. and has served as Assistant Treasurer since 2019.



PRESIDENT & CEO MESSAGE

-JEFF WILEY

As I contemplate the last few months of this fiscal year and attempt to relate it to our organization's efforts, mission and directives, I find myself conflicted.

One the one hand, the last 12 months has been one of the best in the history of the organization. Take any measure of normal activity on assisted deals: new and retained jobs; sector diversity; capital commitment; acreage and commercial square footage under development. FY19/20 represented among the highest output we have been involved with in our 34 years of existence.

Yet in March of 2020, these efforts seem to pale in comparison to the economic devastation caused by a government ordered shut down of business, small and large, and the infusion of fear related to COVID 19 and the worldwide pandemic.

While no one knows the duration or lasting impacts of this health crisis, the economic carnage inflicted to Fort Bend, Houston and the nation as a whole is substantial. The economic slow down has also reduced the worldwide demand of oil and gas and has had a secondary impact on the Houston economy and energy capital of the world as the oil glut has lowered price points and forced reductions in labor force and local disposable income availability that may never come back.

What I do know is that we are a resilient bunch and that the same circumstances that initiated the creation of the FBEDC exist again today. I also know that the foundation of the community and organization is solid, grounded and remains linked in purpose to create and maintain the world class community we have built over the last three decades together.

Notwithstanding our recovery, which will happen. There is a cataclysmic shift underway that has and will impact consumer buying patterns, personal practices, need and use of commercial, professional and retail real estate. There may also be a shift away from highly dense urban lifestyles in the short and long term which should greatly advantage communities like Fort Bend with an abundance of low density, high quality master planned communities.

The hot spot for real estate now and in the future will be warehouse distribution as seen in the previous two fiscal years. Our largest commercial real estate deals outside the solar energy sector have been regional distribution centers from two Fortune 150 companies. These deals bring substantial amounts of square footage, positive local tax impact and wages, albeit lower than average for Fort Bend County.

Our future remains bright, our development climate is fertile and our attitude is resilient. No one knows how long this affliction will last or how soon economic loss will be restored but I do know a few things about our community: we are stronger together than apart; we have 30+ years of collaboration that allows us to row the same direction most of the time; and, like it has been in the past it will be so in the future, when the going gets tough, Fort Bend get's going.

As always, I want to thank our Executive Committee, our Board of Directors, our Members and Staff for an outstanding year of work. I particularly want to thank the members for their financial support in these difficult times. There are many priorities that exist beyond funding our organization and I want to let you personally know how grateful we are that you believe in our mission, capability and the unifying impact our organization has on community direction and engagement. This is never more true, now more than ever. We will adapt to the new environment and thrive until we can once again reengage and reconnect personally each month and renew friendships and business relationships face to face.



Fluor Daniel Building - Sugar Land, TX
HOME OF FBEDC OFFICES

Jeffrey C. Wiley
PRESIDENT\CHIEF EXECUTIVE OFFICER

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GREATER FORT BEND ECONOMIC DEVELOPMENT COUNCIL

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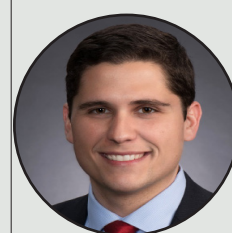
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YEAR IN REVIEW FY2020

2020 HIGHLIGHTS

Capital Expenditure, Commercial Space Add and New and Retained Jobs

The Pipeline

Fort Bend Marketing Program

87th Legislative Session

Operations and Fiscal Responsibility

Infrastructure

Capital Expenditure

FY 2020 represented a robust year from a capital investment perspective in the county with over \$1.2 Billion in future capital investment on FBEDC assisted deals. Over \$820 Million of capital is associated with Solar Energy Farms that will locate in Fort Bend County, \$320 Million in Industrial; \$82 Million in New Manufacturing Facilities and \$31 Million in Office Headquarters Expansion. Each category was up significantly from FY 2019, which was a record year. As always, the success in attracting economic expansion is the result of the partnerships that exist in Fort Bend County especially with the City economic development directors and cooperative and supportive governmental agencies that aggressively pursue economic expansion that generates new long term tax base and increased employment opportunities.

Commercial Space and New and Retained Jobs

Deal flow over the past 12 months represents 1.4 million sf of new commercial space on over 10,000 acres of land and will generate over 1,960 new (1199) and retained (761) jobs.

The Pipeline

The economic shut down due to COVID 19 has all but stopped most new leads and prospects for the time being as everyone assesses the new environment and how long it will take to resume normal activity. We have seen a few leads from the State and Greater Houston Partnership (GHP). Those leads include two definable prospects and discussions with companies and developers on several proposed and conceptual projects.

A brief description of these prospects is provided below:

Project Bridge is an aggregator of cargo for shipments that are less than a full container. It is sited in the Kansas City Southern (KCS) Rosenberg Intermodal Facility (IMF) in Rosenberg's extra territorial jurisdiction (ETJ) in the unincorporated portion of Fort Bend County.

Initially in Ph 1, they would build 250,000 sf with a capital investment of \$30-50 million, and create 50 to 100 jobs. Additional phases would increase proportionally the jobs, facility size, and capital investment. The timing of this deal is tied to the completion of the Darst Rd overpass of IH 69 which would become the main entry into the IMF.

Missouri City has a number of development deals underway including:

- a **Business Park Development** project by Lovett Comerical on Fort Bend Toll Road between Lake Olympia and Trammel Fresno. It's initial project would be a **1,000,000 SF distribution center** user;
- spec space representing 400,00+ sf by a developer on two projects;

- **Project Greg's Garden** - which is a headquarters, research and development, manufacturing and tech support prospect for a 5G company. A number of sites were supplied to GHP and client in mid April. Prospect is searching Central US at this time. The deal represents 200 jobs initially, to grow to 750-1,000 by Year 5. Total capital investment of \$750 million;

- **NewQuest Properties** - is set to begin Fort Bend Town Center II to include a 275,000 SF power center. Missouri City TIRZ #2 modifications will be required to address this development.

Fort Bend Marketing Program

The Fort Bend Marketing Program remained focused on SEM marketing through the first quarter of the fiscal year but took a decided

COMPLETED GFBEDC PROJECTS FY 2019-2020					
Name	Area	Site Acres	Bldg SF	Retained Jobs	New Jobs
AP Solar/Fighting Blue Jays Solar	Uninc. near Guy	3,643			2
PepsiCo/Frito Lay	Uninc. near Rosenberg		140,000	575	
Sugar Land Commerce Center	Sugar Land		350,000		150
Old 300 Solar	Uninc. Near Guy	6,700			2
Si Environmental	Rosenberg		62,000	186	
Wet Sounds	Rosenberg		171,000		45
Amazon Robotics DC	Uninc. Near Richmond		640,000		1,000
		10,343	1,363,000	761	1,199
Total Jobs					1,960

turn toward more engagement with site selectors in the second and third quarters of the fiscal year. Among those efforts was a trip to Charleston, SC as a Fort Bend County team to sit down with key site selectors to build relationships and discuss our community strengths as well as gauge the differentiators they look for in today's markets. During the last three months of the fiscal year the program discontinued outbound marketing and engagement and applied its efforts to a revamping of the web site to prepare for relaunch and economic recovery.

87th Legislative Session (Cont'd)

The FBEDC is working hard on the next legislative session and has targeted a meeting later this year at the Driskol Hotel in Austin to host the 9th consecutive FB Legislative

Session. This allows us to bring public sector entities together with our legislators in advance of the session to work on positions and legislation that allow our successful continuation of our quality growth efforts as a community.

Operations and Fiscal Responsibility

The FBEDC with and through its partner city ED relationships produced a record year of development deals while operating the organization within budget guidelines and maintaining net membership revenues and operating expenses at or better than expected. Staff headcount remained the same. We also produced enough savings throughout the year to contribute to the net assets of the Corporation.

Infrastructure

Among the most significant accomplishments for FY 2019/20 was the

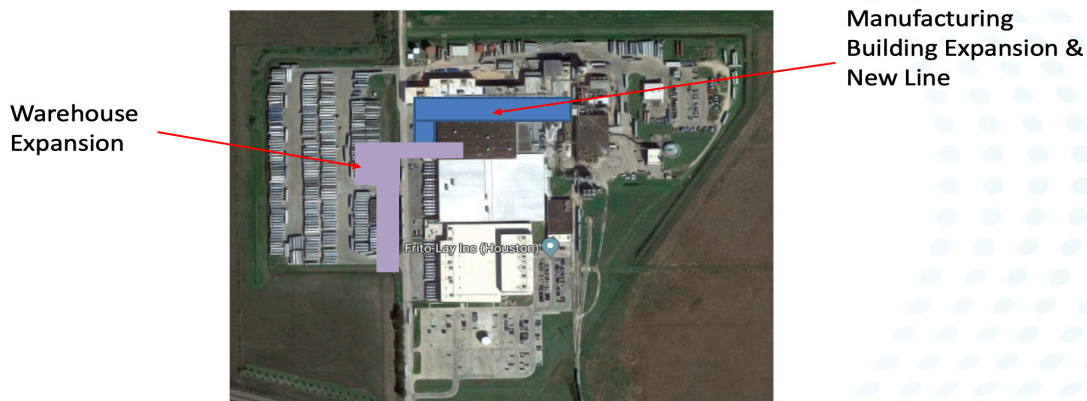
successful reversal of efforts by the Texas Department of Transportation to remove all toll roads from the Unified Transportation Plan (UTP) including vital section of the Grand Parkway. These sections are essential to power or future growth of the local economy and will eventually provide interconnection to the Fort Bend Toll Road providing enhanced mobility and added evacuation capacity during emergencies and allow for future development by the George Foundation and Signarelli Companies that own over 25,000 acres in Central Fort Bend County.

A removal from the UTP would mean that no State resources of any kind could work on the continuation of the project, seriously damaging efforts to further design and build to the minimal standards executed in a joint agreement between impacted counties and TXDOT.





Expansion Footprint: ~120,000 Sq. Ft.



7



Peopsico \ Frito Lay Expansion \Rosenberg, TX

Frito-Lay, Inc. is a leading food and snack producer with over 20 manufacturing sites in the USA. Frito-Lay is a division of PepsiCo Inc., a Fortune 50 global food and beverage company. In Rosenberg, the company owns a plant that operates seven manufacturing lines that produce: Lay's Potato Chips; Tostitos; Cheetos; Baked Cheetos; Fritos; and Tostito Scoops. The proposed expansion would facilitate manufacturing growth necessitating warehouse expansion and equipment and machinery for a new Cheetos manufacturing line. The expansion will consist of adding 140,000 sf to the existing plant of 470,000 sf. The project retains all current 575 full time jobs and will potentially create additional jobs. The capital investment for this explanation is in excess of \$82 million.

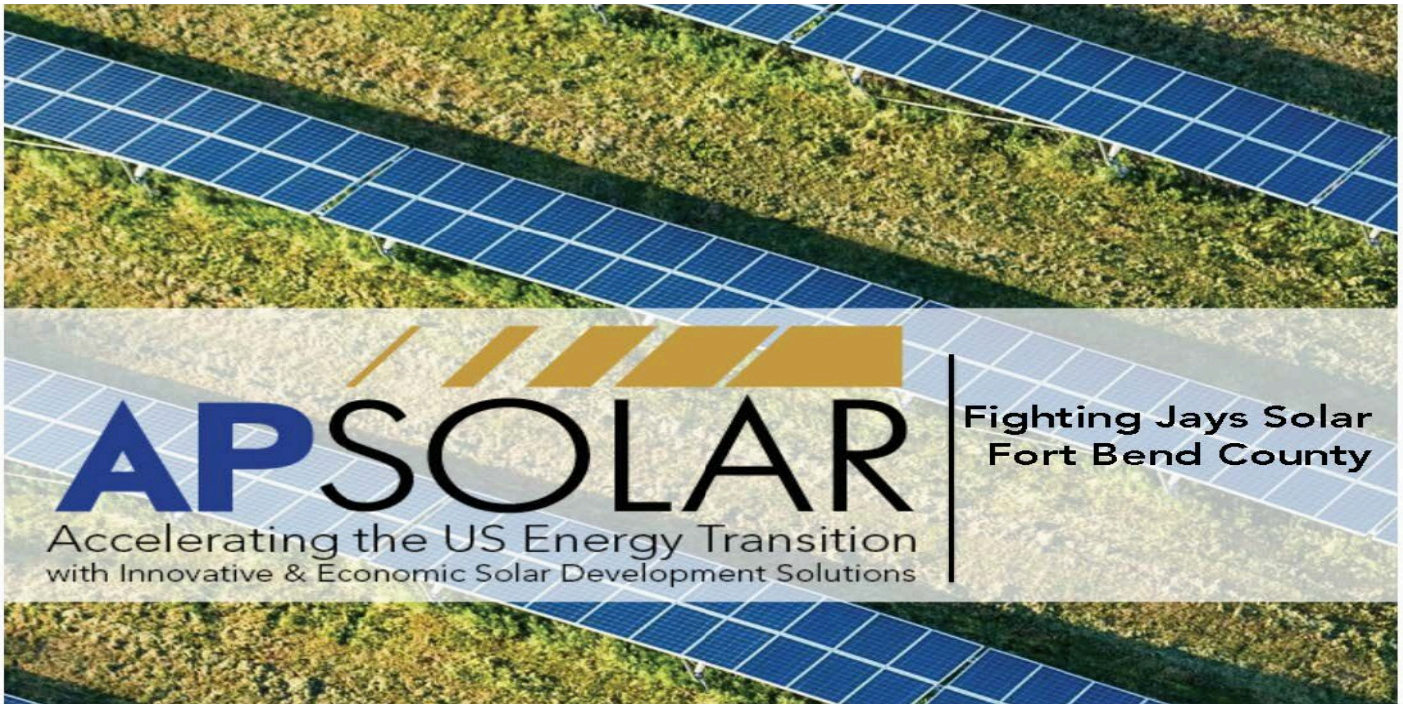


Wet Sounds \ Rosenberg, TX

Wet Sounds was started in 2005 in Houston and designs and develops high end marine audio equipment. As they gained market share with innovative products and superior performances, they have expanded into powersport audio and plan to expand into home audio in 2020. Operations include design, development, and distribution to OEMs and authorized dealers. They currently outsource all product manufacturing, but the expansion and relocation to a new Rosenberg facility of an initial 170,000 sf will allow them to take on light manufacturing for some of its products.

They remain committed to the relocation and expansion but have tabled for now a pair of speculative office/warehouse projects originally discussed pending economic recovery and demand increases. Incentives were provided by the City of Rosenberg's Rosenberg Development Corporation the City of Rosenberg and Fort Bend County.





AP Solar - Fighting Jays Solar FBC

Another mega-sized solar panel generation facility, this project would deliver 300-350 MW of cheap, clean, renewable power to the region. AP Solar Holdings, LLC is a joint venture of Avondale Solar and Plus Renewable Technologies Ltd. AP Solar is a full service, utility-scale solar power project developer focused on the ERCOT market in Texas with a management team that collectively has over 150 years of experience in power generation projects in Texas and throughout the world. This facility will be located in a Reinvestment Zone of over 3,600 acres east of Guy, Texas off the southeast corner of FM 361 and FM 1994, and is adjacent to the southwest of the Long Point Landfill. It is also within the Needville ISD. Capital Investment for this single-phase project is \$382 million with the same trade-off on jobs and major infusion to the county tax roll values as the other two solar mega-projects mentioned previously. Fort Bend County has granted incentives and the Needville ISD and Wharton County JC College are considering value limitation incentives as well.

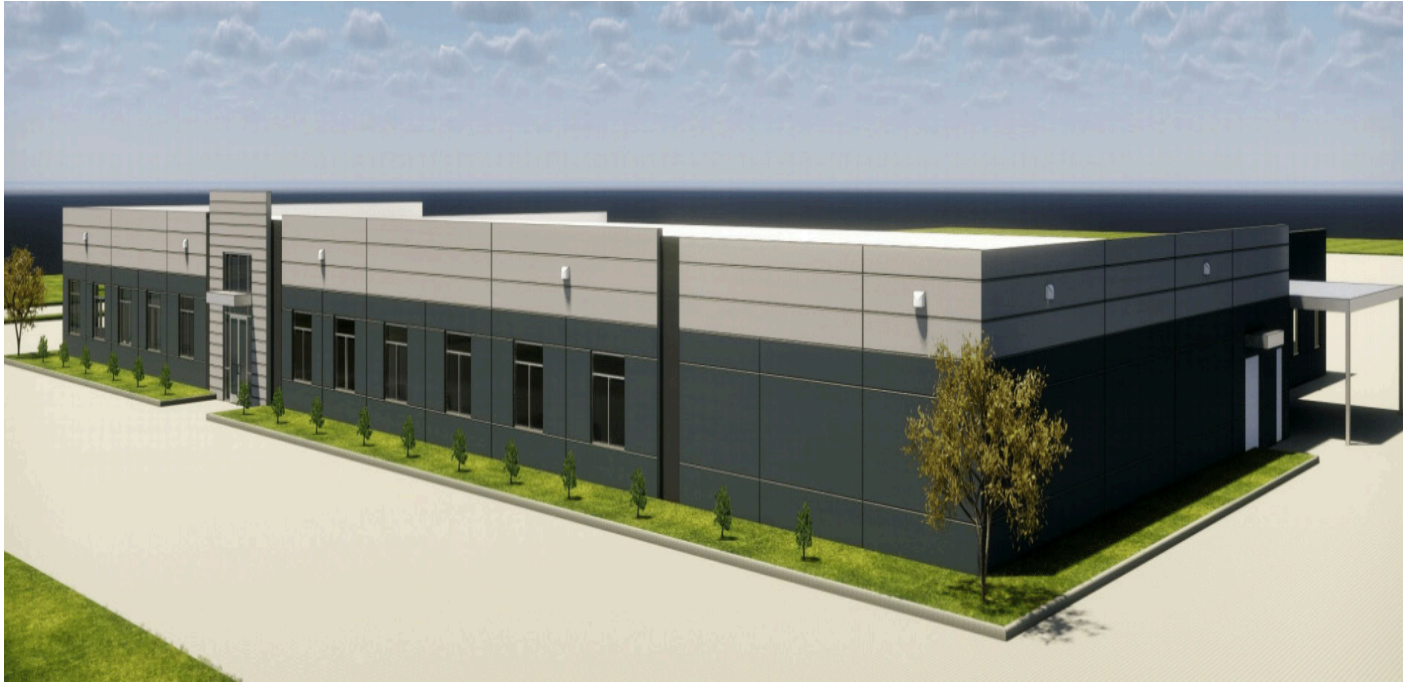
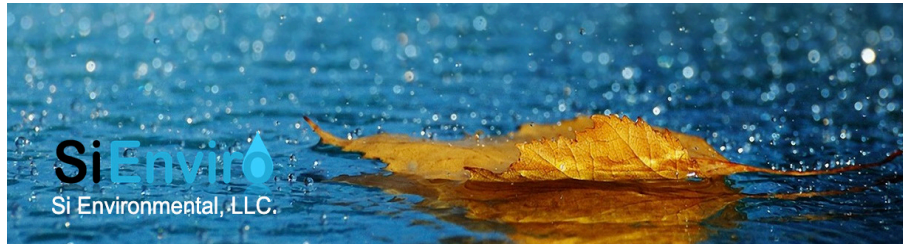


Old 300 Solar

Orsted Onshore recently acquired Lincoln Clean Energy Development, LLC and its parent company Lincoln Clean Energy, LLC (LCE). LCE develops, owns and operates renewable energy electricity generating facilities. LCE has primarily conducted business within the ERCOT service territory (Texas GRID), but has expanded its operations in recent years with projects either under construction or in operation in multiple states and electricity markets across the country. LCE's management team has over 150 years combined experience in power project development, and in the past two years, LCE's efforts have led to the construction of over 4.5 gigawatts of wind and solar projects in North America.

The proposed project is planned to be a 400 MW capacity solar electricity generating facility located on approximately 6,700 acres southwest of Guy, Texas in the Needville ISD. The capital investment for this project is over \$440 million.





Si Environmental \ Rosenberg

Si Environmental is one of the premier water\waste water service companies in the Greater Houston Region with a primary focus on municipal, master planned community and school district clients. They were established in 2012 and presently run their business at a location near Reading Rd and Interstate 69. Over 70% of their business are clients within Fort Bend County.

The new facility planned will be a significant expansion at three times the size of their existing facility. They will relocate and expand their presence in Rosenberg at the ROsenberg Business Park of of FM 2218 near Interstate 69.



Amazon State of the Art Robotics Distribution Center

Amazon is under construction on a new facility on Harlem Rd at West Bellfort off the Grand Parkway situated in the unincorporated area of the County. It represents the latest fulfillment center design utilizing robotic systems and consisting of approximately 640,000 sf of warehouse and distribution space in a 4 story configuration. It will create at least 1,000 new jobs and represents a substantial capital investment in the community. The EDC worked with the developer Trammel Crow, Fort Bend County Engineering and Emergency Management to facilitate permitting and time to market concerns by the company. No incentives were provided on this deal that will greatly contribute to the property and sales tax contributions to the various taxing districts impacted including the County, County Assistance Districts, MUD 30 and Fort Bend ISD.





Parallel Speculative Industrial \ Sugar Land

Transwestern Development Company (TDC), the development arm of Houston based Transwestern, is a diversified business with expertise and experience in the development of industrial, office, multifamily, mixed-use, and healthcare projects. TDC Logistics is the firm's industrial development platform and is a fully integrated part of the business. The firm manages projects through a team approach that includes experts in design, construction, leasing, finance, asset management and building operations. The project is a two building, 343,540 square foot speculative industrial project located at the northwest corner of Dairy Ashford Rd. And W. Airport in Sugar Land Industrial Park.



E Fort Bend Commercial Real Estate Trends

Lisa Bridges Director of Market Research | Houston

Office Market

The Fort Bend office submarket posted 38,962 SF of positive net absorption in Q1 2020. The average vacancy rate decreased to 10.9% from 11.8% over the quarter. The average quoted rental rate increased from \$29.55 to \$30.97 per SF and leasing activity decreased over the quarter by 72%. There are three buildings totaling 105,300 SF under construction. The largest building under construction is a 56,000-SF expansion for the Houston Community College System, located on W Airport Blvd. The building is expected to deliver in May 2020.

Medical Office Market

The average quoted rental rate decreased over the quarter from \$28.00 to \$27.61 per SF. The average vacancy rate fell 200 bps to 15.3% from 17.3% in Q4 2019. Leasing activity declined by 28% over the quarter. Currently, there are no properties under construction.

Industrial Market*

Although the submarket recorded 432,086 SF of positive net absorption during Q1 2020, vacancy still increased due to the completion of new buildings that were added to inventory. The addition of the unleased portion (78%) of 1.3M SF of new inventory increased the average industrial vacancy rate 230 basis points, rising from 7.3% to 9.6%. The average quoted rental rate rose over the quarter from \$7.76 per SF to \$8.10 per SF. Currently, there are 16 buildings with 779,802 SF of industrial space under construction. The largest project is the 199,170-SF speculative industrial warehouse located in the CityPark Logistics Center on S Sam Houston Pky W in Missouri City, TX.

Retail Market

The average asking rental rate for the Fort Bend retail submarket increased from \$22.02 per SF in Q4 2019 to \$23.16 per SF in Q1 2020. The submarket recorded 12,591 SF of negative net absorption in Q1 2020, increasing the vacancy rate from 6.1% to 6.3%. Eight properties totaling 208,395 SF are currently under construction. The largest project is Sienna Crossing Phase III, a 60,000-SF addition that will include Spec's Wine and 24-Hour Fitness as new tenants. The shopping center is expected to deliver in the first quarter of 2020.

Market Indicators	Q4 2019	Q1 2020	
OFFICE			
VACANCY	11.8%	10.9%	↓
NET ABSORPTION	-10,288	38,962	↑
RENTAL RATE	\$29.55	\$30.97	↑
MEDICAL OFFICE			
VACANCY	17.3%	15.3%	↓
NET ABSORPTION	-17,785	34,065	↑
RENTAL RATE	\$28.00	\$27.61	↓
INDUSTRIAL			
VACANCY	7.3%	9.6%	↑
NET ABSORPTION	192,415	432,086	↑
RENTAL RATE	\$7.76	\$8.10	↑
RETAIL			
VACANCY	6.1%	6.3%	↑
NET ABSORPTION	-49,363	-12,591	↑
RENTAL RATE	\$23.02	\$23.16	↑

Data Source: CoStar Property

* For the purpose of this report, the geographical boundaries for the Fort Bend industrial submarket include buildings that are typically considered by our clients when they are seeking locations in the Fort Bend/Sugar Land and Missouri City areas.

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FY 20189 Completed Deals





ASSOCIATION OF AMERICAN RAILROADS

Policy & Economics Department

The U.S. Economy in May 2020

There's an old saying: "This too shall pass. It might pass like a kidney stone. But it will pass." We're still waiting for it to pass. Many economic indicators released in the past month were record-breaking bad, but there were a few signs of hope too. On the "hopeful" front, a net 2.5 million new jobs were added in May. That's a fraction of the 22.1 million jobs lost in March and April, but it suggests the job market is at least beginning to mend. Also encouraging: the official unemployment rate fell to 13.3% in May from 14.7% in April, though it would be several percentage points higher if it included those who've lost their job but aren't looking for a new one because they figure new jobs aren't available. Consumer spending fell 13.6% in April after falling 6.9% in March. Prior to March and April, the biggest decline in the 61 years consumer spending has been tracked was 2.1%. Consumer confidence actually rose slightly in May, but that follows a record fall in April. Plus, many consumers probably figure things can't get worse.

On the manufacturing side, a recent quarterly survey of members by the National Association of Manufacturers found that just 34% had a positive near-term outlook for their company. Last quarter, it was 76%. Manufacturing output fell 13.7% in April, its biggest month-to-month decline in records going back to 1919. The Purchasing Managers Index (PMI), a measure of manufacturing health, rose slightly in May to 43.1. Anything under 50 signals that manufacturing is contracting, but 43.1 doesn't sound that bad. Unfortunately, quirks in the data mean the PMI today probably should be around 10 points lower than it is if it's to accurately reflect today's circumstances.

What's happening now has never happened before and all of us hope it never happens again. Hopefully, the next 30 days will bring better news.

	Dec '19	Jan '20	Feb '20	Mar '20	Apr '20	May '20
NY Fed Wkly Economic Index (p. 7)	150	158	174	-185	-1014	-1010
Purch. Mgrs. Index (<50 = bad) (p. 8)	47.8	50.9	50.1	49.1	41.5	43.1
Non-Manuf. Index (<50 = bad) (p. 8)	54.9	55.5	57.3	52.5	41.8	45.4
Industrial output (p. 9)						
Total (2012=100)	109.6	109.1	109.3	104.3	92.6	n/a
% change from prev. month	-0.4%	-0.5%	0.1%	-4.5%	-11.2%	n/a
Manufact. (~75% of total, 2012=100)	105.1	104.9	104.9	99.1	85.5	n/a
% change from prev. month	0.2%	-0.1%	0.0%	-5.5%	-13.7%	n/a
Capacity utilization (p. 9)						
Overall	77.2%	76.7%	76.7%	73.2%	64.9%	n/a
Manufacturing	75.2%	75.1%	75.0%	70.8%	61.1%	n/a
Employment situation (p. 10)						
Total net new jobs created	184,000	214,000	251,000	-1,373,000	-20,687,000	2,509,000
Unemployment rate	3.5%	3.6%	3.5%	4.4%	14.7%	13.3%
Class I railroad employment						
Total employed	131,486	128,311	127,634	127,867	124,430	n/a
Change in total from prior month	-1,739	-3,175	-677	233	-3,437	n/a
Consumer confidence (p. 11)						
Conference Board (1985=100)	128.2	130.4	132.6	118.8	85.7	86.6
University of Michigan	99.3	99.8	101.0	89.1	71.8	72.3
Consumer spending (p. 11)						
% change from prior month	0.4%	0.4%	0.2%	-6.9%	-13.6%	n/a
% change year-over-year	4.9%	4.8%	5.1%	-3.1%	-16.9%	n/a
New auto sales (SAAR, mil.) (p. 12)	16.6	16.9	16.8	11.4	8.7	12.2
Housing (p. 12)						
Total housing starts (SAAR, mil.)	1587	1617	1567	1276	0.891	n/a
Single-family starts (SAAR, mil.)	1047	0.989	1.034	0.871	0.650	n/a
Multi-family starts (SAAR, mil.)	0.520	0.619	0.514	0.392	0.234	n/a
Rail cars in storage (p. 13)	408,100	400,215	393,850	394,244	418,119	520,729

Perspectives on the Commercial Real Estate Markets and Companies Pre-Covid-19 Virus and Today

With such a dramatic shift in the metrics of the commercial real estate markets and the effect upon the industry's companies and people, we asked several GFBEDC member companies in different sectors of the industry to share their stories. Understandably, there are not a lot of different ways to say 'It was good then, now it's bad.' However, there are different ways to frame what has happened and what the outlook for the future is.

Keith Dalton
President/CEO
KDW, Ltd.

Commercial Construction and Development

Having a diversified group of business operations within and outside of commercial real estate, all which effect economic development, gives me a wide perspective on how different industries have been and will be affected in the future with the Covid-19 challenges. We are all following these different sectors to see who is doing well, who is not, who is coming in first. Our challenge is to stay active in multiple sectors and adjust to quickly changing conditions without spreading ourselves too thin. It's a shell game and we are all trying to follow the pea. When there is loss, there is also gain somewhere else. Essential industries have thrived. Those related to food, on-line retail, distribution of all types, especially the last mile sector (which we think will explode post-Covid), and packaging are growing; pockets of the medical and biopharma sectors are growing and will likely continue to see rapid growth. Companies that have a solid business plan, and not run on a shoe string, will do well when the time is right. The United States is different from the world, we are in better shape to be resilient and recover past where we were. Texas is different from the rest of the United States, we are in better shape to be resilient and recover past where we were. Greater Houston is different from the rest of Texas, we are in better shape to be resilient and recover past where we were. As we settle back in to a sense of normalcy, make no mistake; there will be changes, but not wholesale. Some changes will survive, and some major changes that were underway will be accelerated for the betterment of how we do things in the future.

Larry Indermuehle
President/CEO
Indermuehle & Co/Ico
Commercial Brokerage and Development

After a strong last 5 years of Q1 starts and being right on target for this year's Q1 goals, our outlook for the future was strong in spite of a sluggish oil industry. Then in mid-March, we closed the office and started working from home and did it very well. However, the lack of social interaction has been difficult. Business had slowed down and the future is uncertain. Most people have put long term decisions on hold. In the last two weeks, with the recent focus on re-opening, we are getting more calls and interest. Retailers are in for a hard adjustment and shopping methods, online shopping will increase, and there will be more retail bankruptcies. The office market will see changes as more people continue to work from home reducing the need for large office space footprints., which I see as the wave of the future. We have to basically start over with a new business plan going forward. There will be continued stress on business for the next 12 to 18 months as we wait to see if the virus ticks up again in a second wave. We are a nation of people that will dig deep when this pandemic ends and we will recover and build back strong like before.

Patrick Duffy, MCR
President-Houston
Colliers International
Commercial Brokerage

Pre-Covid the commercial real estate market was in relatively good shape, especially in South East Houston MSA including Fort Bend. Office occupancy was in balance between landlord and tenant friendly and rents were stable to potentially rising in the near term. Industrial occupancy was strong and rents were stable. Retail was tight and solidly in a Landlord's favor. Post Covid, most planned speculative developments have been shelved until there is clarity in the economic fallout from this shutdown and the oil crash associated with the drop in demand. We expect to see a bounce in bankruptcies with companies in the energy sector and especially retail. Industrial will fair better than office and retail will be the hardest hit.

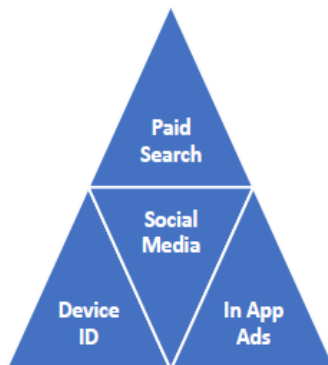


The Fort Bend Marketing Program continued to expand and reinforce the Fort Bend brand and direct dollars into a variety of platforms.

From July 1 through the middle of March, we employed digital tactics to reach targeted audiences, a continuation of our digital branding approach. We created content, identified our audience, and employed ads through various of digital platforms to reinforce our message points:

- *Superior, trained, and diverse workforce;*
- *Exceptional quality of life;*
- *Pro-business, solution driven government;*
- *Available and affordable land/sites;*
- *Quality infrastructure to support enhanced mobility and access.*

Digital Marketing Tactics



11,972,703	•Total Impressions
790,163	•Search Impressions
update	•Device ID Targeted Impressions

FORT BEND MARKETING PROGRAM

DIGITAL TACTICS & RESOURCES

Using cutting edge tactics, the digital campaign has expanded and impressed the brand across multiple platforms using a range of tactics. Social media and in app advertising outreach has been complimented by a targeted audience identified through capturing device IDs and a robust SEM program.

Social Media

The Fort Bend brand has a large footprint in the social space, including a presence on Facebook, Twitter, Instagram, and LinkedIn. Our paid efforts have been concentrated on FB & IG.

In App/Banner Ads

Accessing a targeted audience, look-alike audiences, and re-marketing to site users, In-App and banner ads sent impress the the Fort Bend brand and link to the Fort Bend website.

Site Optimization

On-going site optimization efforts on the backend of the website ensure users have an efficient visit, which improves the site's health score and improves the site's Google ranking and search placement.

Device ID Targeting

Capturing device ID's at large, scalable events that meet targeting criteria ensures the most appropriate audience receives our ads from social media and in-app and banner/search ads.

Search Engine Marketing

The FB Marketing Program identifies and purchases key words and phrases in the search engine universe, placing the www.fortbendcounty.com site in front of users.

Content Development

Creating appropriate content is critical to a digital outreach program. Once our users engage the advertisement piece, which requires strong content, the users are sent to site rich with editorial and video content.

RECRUITMENT & OUTREACH

Fort Bend County Economic Development Team visited Charleston for a site selector conference this December and held a private dinner for select consultants.



Outreach email list of 109 brokers, consultants, and site selectors to share news on Fort Bend County and announce projects.



Direct Regional Recruiting

In addition to digital branding and targeted outreach, the program added another layer to compliment the digital approach. Working collaboratively with the county's economic development directors, we initiated a program to reach out to brokers, consultants, and site selectors directly.

In December, the EDD team comprised of representatives from the FBEDC and cities of Fulshear, Richmond, Rosenberg, Stafford, and Sugar Land traveled to an event in Charleston, South Carolina to meet with site selectors and consultants and introduce Fort Bend County to them at a private dinner sponsored by the marketing program. This event was met with positive feedback from the economic development directors as well as the consultants.

There was considerable interest among the EDD team in continuing this effort moving forward and expanding the direct recruitment to multiple (2) trips per year or to engage in a single travel trip and to schedule a two-day regional (county-wide) "Fam Tour" through our collective contacts with the site selector and consultant community

Regional Trip & "Fam Tour" Process

Ensuring regional buy-in and sustainable outcomes



COVID-19 Response

As a result of the COVID-19 pandemic, the digital marketing program was suspended in mid-March.



To support the county's communication efforts and to share information with our business community and those seeking to do business with Fort Bend County, we created a COVID-19 resource page on our website and updated our social media regularly to support the county's testing and containment policies.

Information was compiled from the Small Business Association, The US Chamber of Commerce, the Governor's Office and others to ensure we provided reliable, direct information and access to resources.

Additionally, we re-directed digital media dollars to engage a company to redevelop the Bend County website, which will be completed late this fall. The new site will be a more modern, robust site capable of housing the existing data and video content as well as incorporate third party tools which are data rich and intuitive. As our direct recruitment expands, we must ensure our website is a strong landing space that tells the Fort Bend story, both in a narrative as well as data specific format.



Numbers That Excel

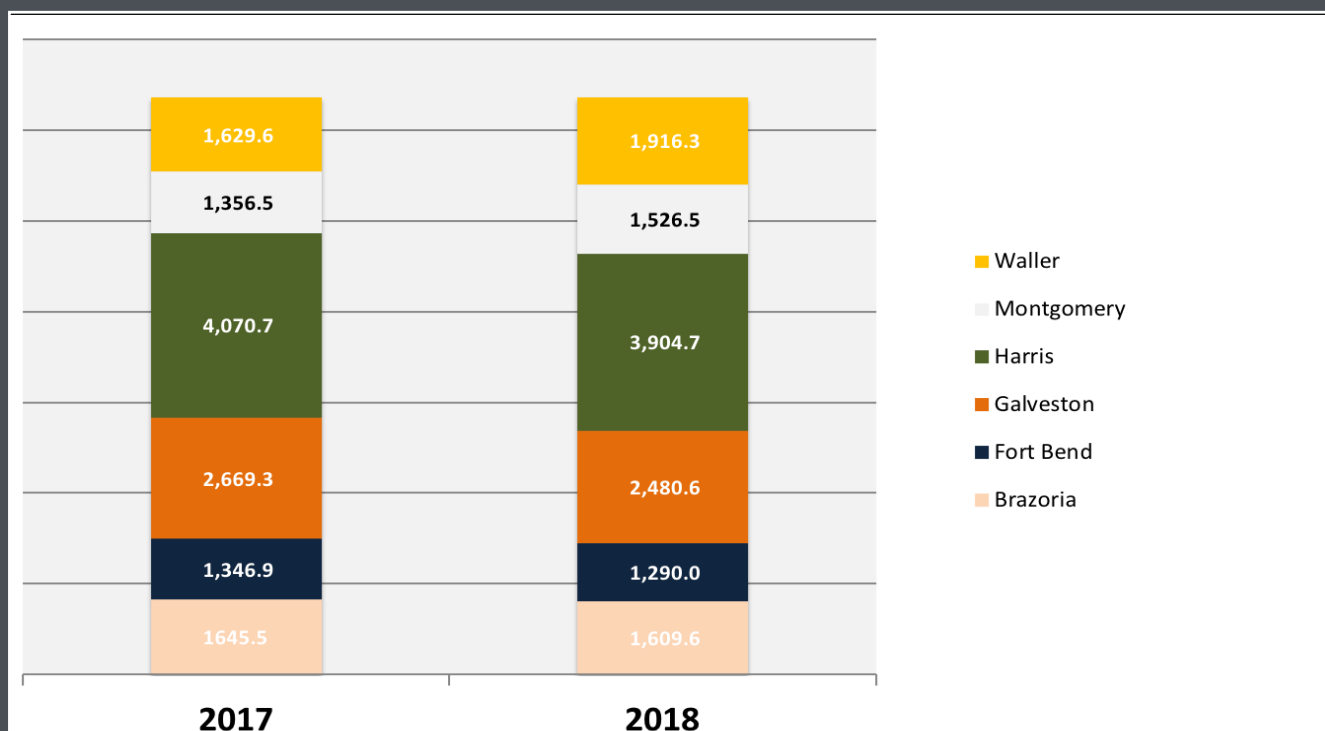
POPULATION, EMPLOYMENT AND QUALITY OF LIFE

Fort Bend's Labor Force continues to grow and has once again climbed to one of the top seven leaders in growth relative to the largest 349 counties quarterly reviewed by the Bureau of Labor Statistics. These counties make up a substantial majority of all employment in the country. With 4.3% growth, Fort Bend ranks 7th in the nation and third in Texas for employment growth year over year through December 2018. Midland, TX was No. 1 in the Nation and Brazoria was No. 5.

For 2017, Woods & Poole Economics of Washington DC compared Fort Bend County to all 254 counties in Texas; Fort Bend County ranks in the top 10% for the following:

	1986	2019	
Population	195,742	811,688	US Census
Average Household Income	\$36,930	\$197,914	Woods & Poole 2018
Total Employment	82,300	383,009	TAMU Real Estate Center
Est # Jobs in Fort Bend County	44,045	169,355	US Census 2017*
Unemployment Rate	10.7%	3.21 %	TAMU Real Estate Center
Poverty Rate	12.5%	7.9%	US Census

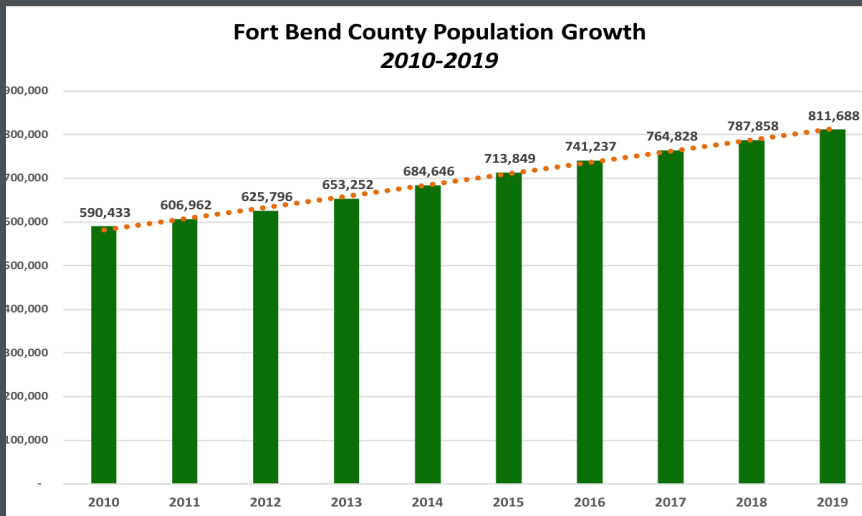
REGIONAL CRIME DATA



Source: Texas Department of Public Safety

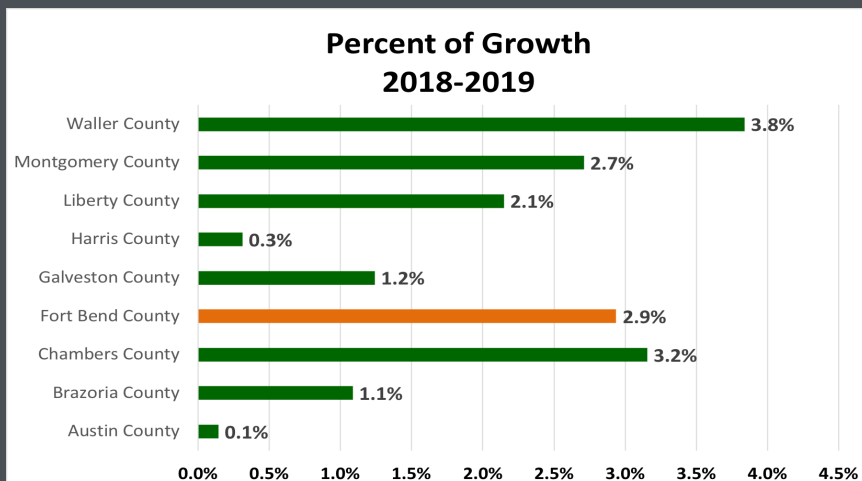
Fort Bend continues to have one of the lowest overall crime rates in the region among the top 6 counties in population based on crime incidents per 100,000 population. Overall regional crime incidents per capita are trending down for all counties in the region except Montgomery and Waller. Fort Bend has maintained its leadership role in this important statistic and over the past decade led in least number of incidents per capita.

Numbers That Excel



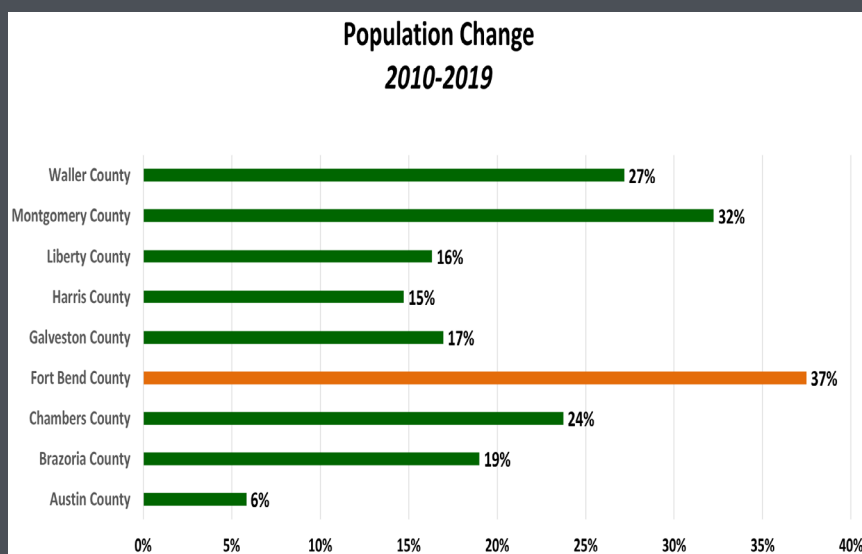
Source: US Census Bureau

Fort Bend's population stands at 811,688 people as of 2019 based on US Census forecasts averaging roughly 25,000 new residents a year since 2010. Fort Bend is one of the 10 largest counties in the State of Texas. Notwithstanding, it has one of the fastest population growth rates in the state no matter the size of the county, large or small.



Source: US Census Bureau

Fort Bend grew faster than most counties in the region but was outrun by Waller and Chambers counties, two of the less populated counties in the Region. No doubt the Grand Parkway will create new growth opportunities for perimeter counties as Fort Bend experienced throughout the last 20 years. However, we also have substantial opportunity as I69 pushes westward to the County Line and Grand Parkway Segment C eventually expands South Southeast.



Source: US Census Bureau

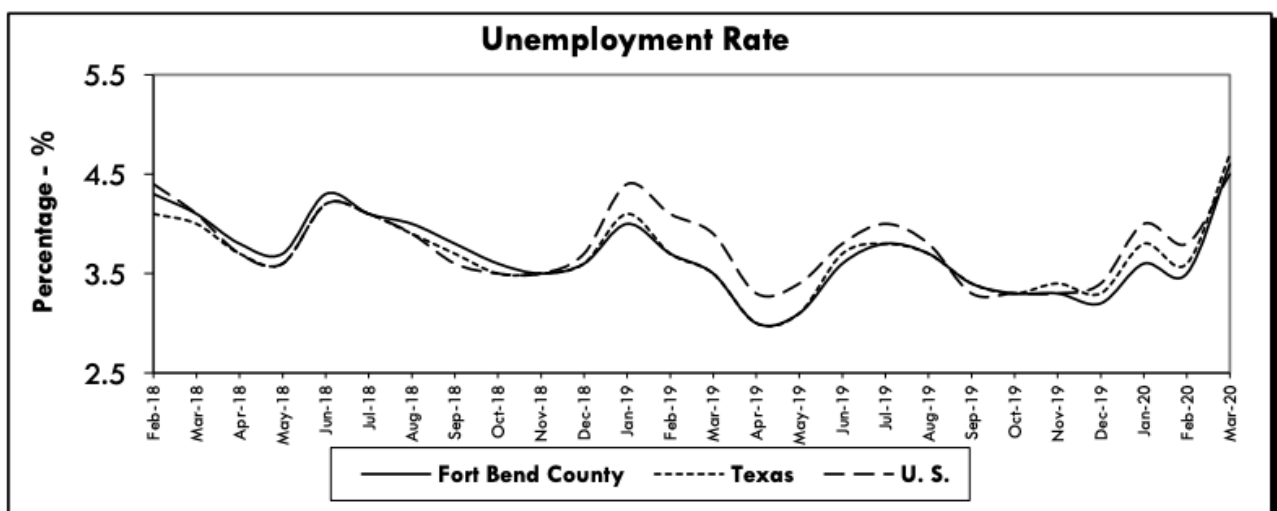
Over the last 9 years Fort Bend has averaged nearly 37% growth in its population, outperforming all of its peer regional counties, despite having the second highest population base in the region. This growth has also been high quality growth as families moving to Fort Bend continue to exhibit high education achievement, household income and purchasing power.



County Employment Data*

The rate of unemployment in Fort Bend County rose more than one full percentage point in March to 4.6 percent due to conditions related to the coronavirus. The rate of unemployment at the state level also rose more than a percentage point to 4.7 percent while the national rate only rose seven-tenths of a percentage point. While early impacts are evident in March's rate of unemployment, the more substantial impacts will not be known until the release of April data on May 22nd. Total covered employment in the county added 121 jobs over third quarter 2019. The 0.1 percent third quarter increase was much weaker than a year earlier when the county increased by 1.1 percent. The largest contributor to job growth was Education and Health Services, up 322 jobs. The next largest increase was Natural Resources and Mining, up 116, with several other industry sectors reporting smaller gains. Job gains were offset by substantial declines in Construction, down 197 jobs, Trade Transportation and Utilities, down 71 jobs, and Local Government, down 359 jobs. The pace of job growth in the county peaked in late 2018 at 6.8 percent and has since been steadily declining to the current pace of 2.8 percent, up 5,343 jobs over the year. The slowing in job growth has been across most private-industry sectors. Largest over-the-year increases were in Educational and Health Services, up 1,672 jobs or 5.6 percent, and Professional and Business Services, up 1,448 jobs or 6.8 percent. The only substantial declines were in Financial Activities, down 164 jobs or 2.2 percent, and Construction, down 144 jobs or 1.2 percent.

	MAR 2020	FEB 2020	MAR 2019
Civilian Labor Force	394,068	399,539	391,023
Total Employment	375,772	385,635	377,395
Unemployed	18,296	13,904	13,628
Unemployment Rate	4.6%	3.5%	3.5%
Comparative Actual Rates			
Texas	4.7%	3/6%	3.5%
U.S.	4.5%	3.8%	3.9%



*Estimates reflect actual (not seasonal adjusted) data. Civilian Labor Force includes wage and salary workers, self-employed, unpaid family, domestics in private households, agricultural workers, workers involved in labor disputes and the unemployed, all by place of residence. Covered employment data compiled from 3rd quarter 2019 contribution and wage reports submitted to the Texas Workforce Commission by employers' subject to the Texas Unemployment Compensation Act. Source: Texas Workforce Commission in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics. All data is subject to revision.



Labor Market Information

COVERED EMPLOYMENT Industrial Sector	Number of Jobs			Quarter Chg		Annual Chg		Avg Wkly Wage*
	3RD QTR 2019	2ND QTR 2019	3RD QTR 2018	Actual	%	Actual	%	
Total Employment	195,797	195,676	190,454	121	0.1%	5,343	2.8%	\$1,046
Natural Resources & Mining	3,725	3,609	3,756	116	3.2%	-31	-0.8%	\$3,226
Construction	12,190	12,387	12,334	-197	-1.6%	-144	-1.2%	\$1,898
Manufacturing	14,478	14,447	14,063	31	0.2%	415	3.0%	\$1,672
Trade, Transportation, & Utilities	41,976	42,047	41,281	-71	-0.2%	695	1.7%	\$857
Information	2,250	2,203	2,095	47	2.1%	155	7.4%	\$1,121
Financial Activities	7,446	7,382	7,610	64	0.9%	-164	-2.2%	\$1,542
Professional & Business Services	22,665	22,609	21,217	56	0.2%	1,448	6.8%	\$1,381
Education & Health Services	31,454	31,132	29,782	322	1.0%	1,672	5.6%	\$750
Leisure & Hospitality	27,674	27,707	27,089	-33	-0.1%	585	2.2%	\$368
Other Services	6,185	6,156	5,897	29	0.5%	288	4.9%	\$636
Nonclassifiable	241	164	391	77	47.0%	-150	-38.4%	\$667
Public Administration	25,512	25,831	24,938	-319	-1.2%	574	2.3%	\$1,016
Federal Government	879	829	814	50	6.0%	65	8.0%	\$1,328
State Government	2,938	2,948	2,833	-10	-0.3%	105	3.7%	\$948
Local Government	21,695	22,054	21,291	-359	-1.6%	404	1.9%	\$1,013

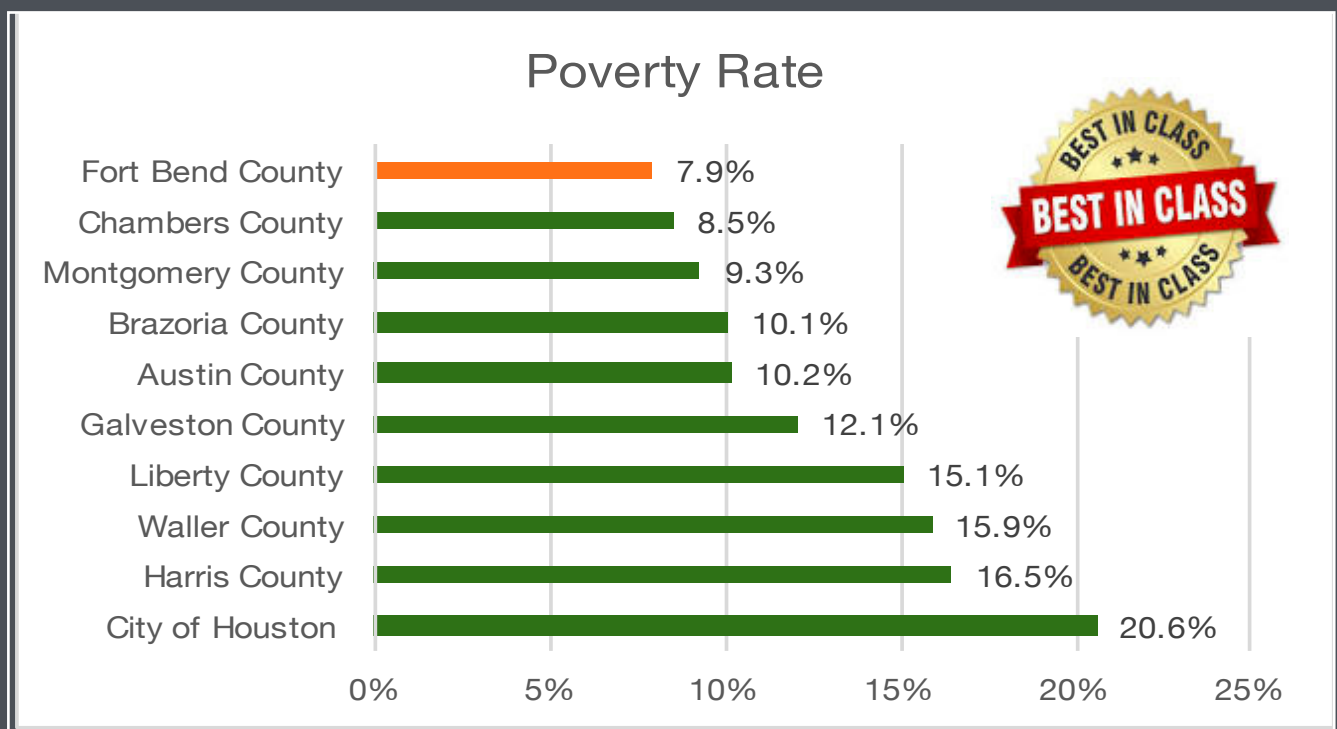
*Wages compiled from 1st quarter 2019 contribution and wage reports submitted to the Texas Workforce Commission by employers' subject to the Texas Unemployment Compensation Act. Date source: the Texas Workforce Commission, Labor Market and Career Information Department in cooperation with the Bureau of Labor Statistics, U.S. Department of Labor.



KEY STATS TO WATCH

FORT BEND POVERTY RATE LOWEST IN REGION

Fort Bend's Poverty Rate is also among the lowest in the State. Fort Bend's has the 10th lowest poverty rate among all 254 counties in the State of Texas. Fort Bend also has the lowest poverty rate among all counties in the Greater Houston Region. Of the top 10 counties for lowest poverty rate in the State of Texas, only four have populations above 200K, including No. 3 Williamson County (590K population) at 6.4%, No. 4 Collin County (1.03 M in population) at 6.4%; No. 6 Denton County (887K in population) at 7.3% and No. 9 Fort Bend County (811K in population) at 7.9%. Our poverty rate has steadily declined since the inception of the organization in 1986 when our County's poverty rate stood at 12.5%. While there is more work to do, we have made great strides. As John F. Kennedy once said, "A rising tide lifts all boats".



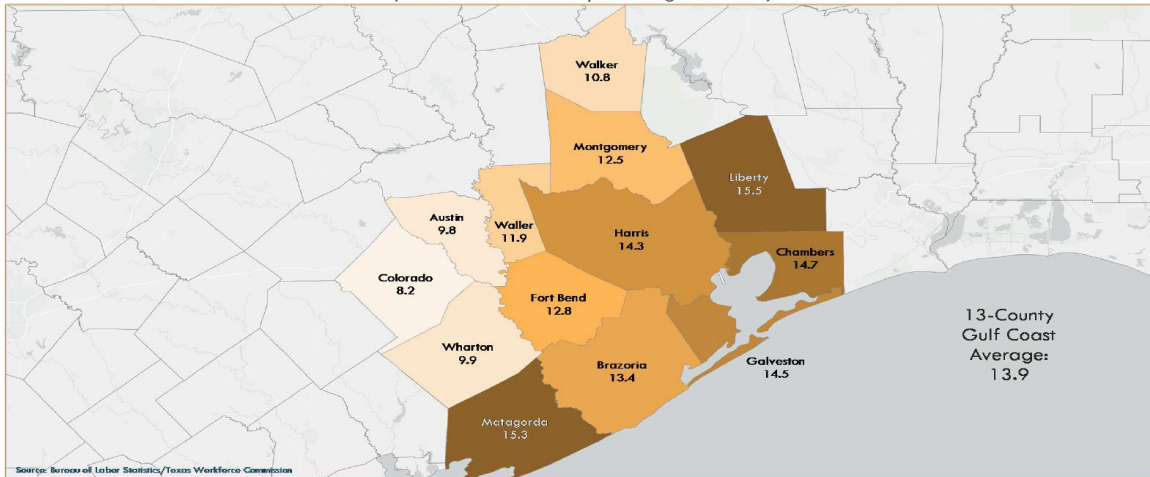
Source: US Census

FORT BEND COUNTY LABOR MARKET

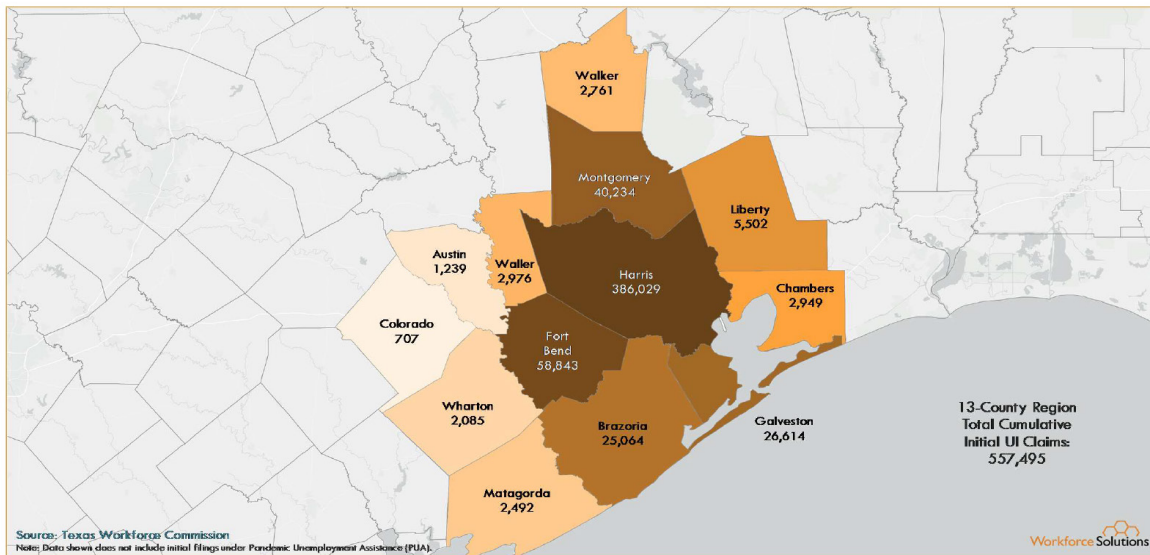
Fort Bend's labor market, like most of the country, was at historic employment thresholds prior to mid-March 2020. Holding constant at 3.5% from the year prior, we were close to full employment in that everyone that wanted a job, could get one. Since that time though, furlough's, force reduction and other labor force reductions caused by the economic shutdown increased the county's unemployment rate by 1.1 percent through March 2020. While Fort Bend County and most of its cities continue to fare much better than other counties and communities in the region, the impact has been significant. Note that in the charts that follow, the full impact of the economic shut down is not yet reflected as April, May and June data will show how deep and long the trough will be. These charts will be updated throughout the summer as new data becomes available.

FB Labor Force - The COVID Impact

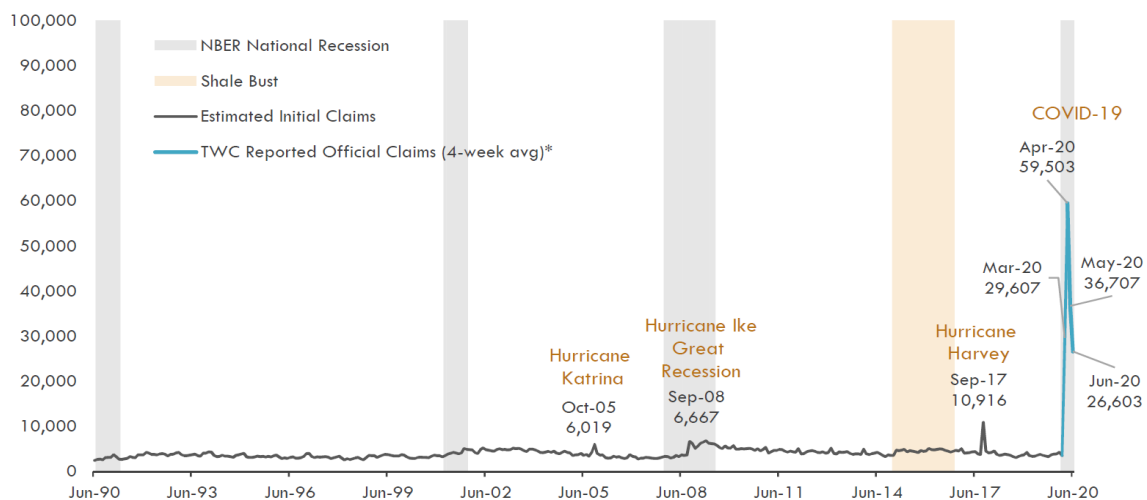
13-County Gulf Coast Region Unemployment Rates
May 2020
(same information as preceding bar chart)



13-County Gulf Coast Region Cumulative Initial Claims for Unemployment Insurance
March 7, 2020 to May 23, 2020



Gulf Coast Region - Initial UI Claims Historical Estimates and Actual
June 1990 to June 2020 (monthly averages)



COVID 19 RESPONSE AND ECONOMIC RECOVERY

It goes without saying that among all the hardship events that have occurred during the lifetime of this organization, nothing is quite like the COVID 19 event. Both a health and economic crisis, COVID 19 has wrought havoc on our health care delivery system, our consumer based economy, unemployment levels, use and demand for commercial space, demand for technology solutions and almost every other aspect of life and commerce.

For us, this event has reinforced how interrelated our way of life is and why public and private entities must work together to ensure the health of the ecosystem underlying a community's strengths and economic underpinnings. We have known for quite some time that in order to have economic prosperity, all sectors must work together to prosper. At the core of this effort is an economy built around strong business growth, strong local employment growth, a business and political climate that welcomes and invests in business growth and a community always focused on excellence and quality growth.

Now more than ever, the response to COVID 19 must be a singular focus on safely reopening our economy. If businesses don't prosper, employers do not hire, jobs disappear, disposable income shrinks, consumer spending declines, property values decline and tax revenues supporting municipality staff and services goes away. This can be seen historically in rust belt cities that became too onerous to operate in relative to other localities from a business and labor regulations perspective.

COVID 19 has had that impact nationally and on a worldwide basis. Along side that, the Houston metro market has experienced the boomerang impacts of the worldwide economic slow down on energy demand. These are challenges we all must face in this region. The good news is, we have done so before, under different circumstances and weathered the storm coming out better for going through the process. In fact the oil bust of the 1980's was the singular reason this organization exists today as the importance of focusing on economic restoration must be at the heart of any come back.

Over the past few months, I am particularly pleased to report the cooperation among city economic development leaders, chambers, local economic development organizations and our mayor and council leadership and state and federal elected officials. We have been proud to lead weekly calls since mid-March focused on efforts to weather this storm, seek fiscal assistance and facilitate a number of efforts to get help to our local businesses.

We are particularly proud of the close relationships established since March with our chambers and economic development directors, the SBA, UH Small Business Development, Gulfcoast Workforce Development and our congressional local staffs in the Houston market.

For 16 years I have been in the organization, we have very little interaction with the SBA or local banks dealing with SBA loans. That has changed substantially with the COVID 19 occurrence and the passage of the Cares Act. I think the public private partnership that emerged from the COVID 19 experience has been a very successful example of how government, private business and local business advocacy can be combined to deliver great results. Payroll Protection Program (PPP), Economic Injury Disaster Loans (EIDL) and other new forms of business assistance from the Cares Act has been welcome, albeit limited assistance, to an economy shut down since mid March.

I want to particularly complement our member local community banks and credit unions that have helped so many of our members and local businesses gain relief. I can personally attest to their professionalism as we went through the PPP loan program with many businesses requesting assistance.

In addition, on June 9, 2020 the Fort Bend County (FBC) Commissioner's Court approved the FBC Small Business Grant Program and on June 23, 2020 amended the program to expand coverage to businesses with revenues up to 5 million annually having 1 to 50 full time equivalent employees per federal tax ID. Applications began on June 15, 2020 and run until funds are exhausted.

COVID 19 is also expected to have a particularly harsh impact on our governmental members including the County, City and municipal utility district members. The County expects a \$11-14 million hit to their operating budget through the end of the fiscal year. Cities, whose budgets are highly dependent on sales tax receipts, are also nervous about their revenue sources needed to maintain services to the community. Some communities saw a net decline of nearly 25% in sales tax receipts for April 2020 while others saw very minimal impacts. As of this writing, we are cautiously optimistic that economic impact and duration may be less than expected. However, the resurgence of COVID 19 cases in the Houston Region after Memorial Day is not good news. As we discussed in our June membership meeting, we are going to have to live with this virus until a vaccine is found to be effective or therapies mitigate the impacts or severity of the virus or until the general population has built sufficient immunity to reduce outbreaks.

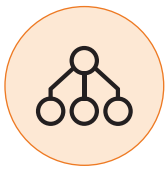
Finally, I feel very strongly that we all must make the best of the hand we are dealt. In the many ways this crisis has been damaging, it has also revealed new partnerships, ways of communication and ways of doing business that will live beyond the ravages of COVID 19 on families, business and our local governments. It also serves as a warning to all businesses and governments alike to plan for the worst and strive for the best.

GFBEDC Mission



The purposes for which this corporation is formed are to assist in and take a leadership role in the strategic planning, implementation and communication of the economic and physical development and redevelopment of Fort Bend County including without limiting the generality of the foregoing:

- To coordinate and improve the economic vitality of Fort Bend County by promoting and preserving a positive climate for business and investment including the redevelopment of economically disadvantaged areas;
- To identify and aggressively pursue the location and expansion of qualified businesses and well planned residential ventures to Fort Bend County;
- To participate and cooperate with other organizations and governments in support of common interests and to facilitate solutions to problems that cross geo-political boundaries;
- To help ensure that the necessary infrastructure for economic growth is in place



Cooperation

Our communities partner to achieve more together than they could alone.

Our members and community leaders understand that commercial development is essential to providing jobs locally to our residents and providing a growing tax base that can offset the service cost of a growing population.

When we sit down with companies interested in our community, expect to see the city, county, school districts and special districts working together to make Fort Bend the location of choice. That's how we do business.



Pro-Business

Corporate expansion and relocations are the cornerstone of growing successful communities.

Maintaining a posture toward winning deals is imperative. While it is much better to gain growth without business incentives, it is far better to land a desired prospect with incentives than to lose the deal.

We will continue to aggressively pursue incentive structures to gain new business growth and elevate strategic developments to their highest and best use.

In this endeavor, nothing ventured, nothing gained is the mantra.



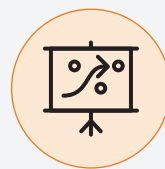
Education

Fort Bend began its growth cycle because this community offered safe, superior schools.

Coupled with master planned communities, Fort Bend County has become the regional leader in population growth rate and average household income.

Good schools attract and bad schools repel. We remain focused on ensuring our school districts show fiscal responsibility, appropriate and necessary facility enhancement, and maintain low tax rates.

Expansion of higher education has also been a priority for the organization and the FBEDC works closely with UH, TSTC, HCC and WCJC in efforts to expand capacity, programs and workforce capability.



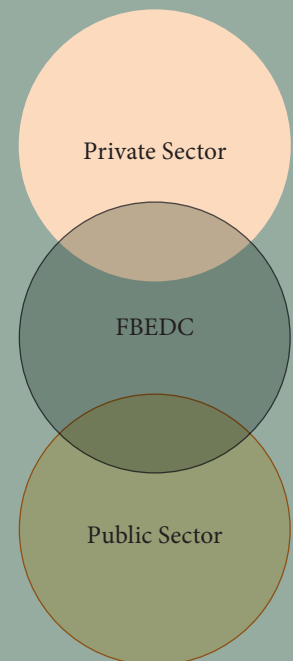
Proximity

Fort Bend County's location in the Greater Houston region is strategic and proximate to Houston work and entertainment centers, seaports and airports.

That proximity is made all the more important by key transportation corridors that link people and businesses in Fort Bend County to the rest of the region. These important corridors include: Interstate 10; Interstate 69; Fort Bend Toll Road; West Park Tollway; Grand Parkway; and Highway 90A.

Connectivity and Infrastructure are powerful motivators to our business community. Fort Bend remains well positioned for growth in the coming years.

HOW WE DO IT — Public Private Partnership



Membership:

189 Members as of 6/30/2020



AAaron Property Investments
AccessHealth
Accredo Packaging, Inc.
Airia Development Company
Aldi Texas LLC
Allegiance Bank
Allen Boone Humphries Robinson, LLP
Amegy Bank
AmTrust Title
AP Solar Holdings, LLC
Applied Optoelectronics, Inc.
Associated Testing Laboratories
AUTOARCH Architects, LLC
BancorpSouth
BBVA Compass
Ben E. Keith Management Trust
Berg Oliver Associates
Best Buy
BGE, Inc.
Bracewell LLP
Browne McGregor Architects, Inc.
CenterPoint Energy
Central Fort Bend Chamber
City of Arcola
City of Fulshear
City of Katy/Katy Development Authority
City of Meadows Place
City of Missouri City
City of Needville
City of Richmond
City of Stafford
City of Sugar Land
City of Weston Lakes
Classic Chevrolet of Sugar Land
CNC Manufacturing
Coats Rose Yale Ryman & Lee, P.C.
Colliers International
Comcast
Community Bank of Texas
Compass Land Development
Continental Polybags
Costello, Inc.
Cutlass Solar LLC - Advanced Power
D.E. Harvey Builders, Inc.
DAC Engineering
Dhanani Group Inc
Dimension Energy Services
E.E. Reed Construction, L.C.
EHRA Engineering
Emerson Automation Solutions Final Control US LP
Escalante Golf (Blackhawk Country Club)
First Colony Community Association
FiServ Output Solutions
Fluor Corporation
Fort Bend Chamber of Commerce
Fort Bend County
Fort Bend County LID # 2
Fort Bend County LID #10
Fort Bend County WC & ID No. 2
Fort Bend Independent School District
Fort Bend Industrial Development Corp
Fort Bend MUD #118
Fort Bend Solar - Diode Ventures, LLC
Fort Bend Subsidence District
Freese & Nichols
Frito-Lay, Inc.
Frost Bank
Fulshear-Katy Area Chamber of Commerce
Geotest Engineering, Inc.
Gulf Coast Water Authority
Half Associates
Harrison Interests, Ltd.
Heavy Construction Systems Specialists
Helix Infusion Therapy
Hexion, Inc.
Hilltop Securities, Inc.
Holoway Jones Law Firm LLC
Houston Community College System, SW
Houston Landscapes Utd.
Houston Methodist Sugar Land Hospital
Houston Southwest Airport
HR Green
HR In Alignment, LLC
Hudson Products Corporation | Chart Industries
Huitt-Zollars, Inc.
ICO Commercial
IDCUS, Inc.
IDS Engineering Group
Imperial Linen Services, Inc.
Interiorscapes of Houston
Jacobs Engineering Group, Inc.
Johnson Development Corporation

KALUZA, Inc.
Kansas City Southern
Katy Area Chamber of Commerce
Katy Area Economic Development Council
KDW - Kingham Dalton Wilson
Kelsey-Seybold Clinic
KenWood & Associates, P.C.
Lake Management Services, LP
Lamar Consolidated ISD
Legacy Ford
Linbeck Group
Lincoln Clean Energy, LLC
Linebarger Goggan Blair & Sampson, LLP
LJA Engineering, Inc.
M.D. Anderson Cancer Center - Sugar Land
Marsh Wortham, a division of Marsh USA Inc
Masterson Advisors LLC
McDonald & Wessendorff Insurance
Memorial Hermann Sugar Land Hospital
NALCO Champion
NewFirst National Bank
Newland Communities
NewQuest Properties
Niagara Bottling, LLC
OakBend Medical Center
Odyssey Engineering Group, LLC
Pamela Printing Company
Paradigm Consultants, Inc.
Perdue Brandon Fielder Collins & Mott
Perry Homes
Pioneer Bank
Planned Community Developers
Port Freeport
Post Oak Municipal Advisors LLC
Prosperity Bank
R.G. Miller Engineers, Inc.
Republic Services, Inc.
Resolution Real Estate Services
Rice & Gardner Consultants, Inc.
Rich Products Corporation
Richfield Real Estate Corporation
Riverpark on the Brazos POA
Robert Hebert and Associates
Roberts Markel Weinberg Butler Hailey PC
Rosenberg Development Corporation
Rosenberger Construction, LP
S&B Infrastructure, Ltd.
Satterfield & Pontikes Construction Inc
Schlumberger
Schwartz, Page & Harding, L.L.P.
Si Energy
Si Environmental, LLC
Sienna Plantation LID

Sienna Plantation MUD #1
Sienna Plantation MUD #2
Southwest Electronic Energy Group
Spirit of Texas Bank
Sprint Fort Bend County Landfill, LP
St. Luke's Sugar Land Hospital
Stafford 59 & Airport, LP
Stafford Municipal School District
Stantec
Star Gessner Properties, Ltd.
Stewart Title Company
Storm Water Solutions, LLC
Sueba USA
Sugar Land Baseball (Sugar Land Skeeters)
Sweetwater Country Club
Tax Tech, Inc
Taylor Morrison of Texas, Inc.
TDECU
Terracon, Inc.
Texas Instruments
Texas State Technical College
The First State Bank of Louise-Sugar Land
The Hunton Group
The Muller Law Group, PLLC
Toll Brothers
Tolunay-Wong Engineers, Inc.
Trammell Crow Company
Tramontina USA, Inc.
TranSystems Corporation Consultants
Tristar Holdings, Inc.
Twinstar Bakery
Twinwood U.S., Inc.
U.S. Congressman Pete Olson
Union Pacific Railroad
Universal Surgical Partners
University of Houston
Van De Wiele & Vogler, Inc.
Ventana Land Development Companies
Warren Alloy
Wharton County Junior College
Whitley Penn LLP
Windstream Communications
WJ Interests, LLC
Woodforest National Bank

