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MESSAGE FROM
THE CHAIRMAN

I have spent most of my career in Fort Bend County developing master planned communities, business parks and mixed-use development. It was apparent then as it is now that quality growth and development is dependent on cooperation, high standards, communication and public-private partnerships. Growth for the sake of growth is not the objective but quality growth is.

This past commitment to quality by developers and governmental entities has resulted in our county surpassing all other counties in the region in terms of population growth rate. Not only have we dominated the rate of growth in people, but in doing so, have produced the highest paid, best educated population in the region.

Good leadership, good management, high standards, finding ways to attract quality growth must be our mantra and it must be ingrained in the character of our leaders, business and government alike.

Our county is 885 square miles with less than 40% developed. Our future remains ahead of us and our organization has always believed that the best way to predict the future is to create it.

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 and our community.

Les Newton
CHAIRMAN OF THE BOARD
A Reflection in Words of our Vision in Action

“ALL GROWTH DEPENDS UPON ACTIVITY. THERE IS NO DEVELOPMENT PHYSICALLY OR INTELLECTUALLY WITHOUT EFFORT, AND EFFORT MEANS WORK”
~Calvin Coolidge, 30th President of the United States~

“CONFORMITY IS THE JAILER OF FREEDOM AND THE ENEMY OF GROWTH”
~John F. Kennedy, 35th President of the United States~

“I GUESS IT COMES DOWN TO A SIMPLE CHOICE REALLY, GET BUSY LIVING OR GET BUSY DYING”
~Andy Dufresne, Shawshank Redemption~

THE BEST WAY TO PREDICT THE FUTURE IS TO CREATE IT”
~Herb Appel, Former CEO Greater Fort Bend EDC~
MEET THE REST OF FBEDC’S EXECUTIVE COMMITTEE

The Executive Committee manages the business, affairs, and property of the corporation and possesses 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 to the purposes for which the organization is chartered.

FBEDC — 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:

1. 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;

2. To identify and aggressively pursue the location and expansion of qualified businesses and well planned residential ventures to Fort Bend County;

3. To participate and cooperate with other organizations and governments in support of common interests and to facilitate solutions to problems that cross geopolitical boundaries;

4. To help ensure that the necessary infrastructure for economic growth is in place.

PRESIDENT & CEO’S MESSAGE — Jeff Wiley

It is hard to believe that our organization turned 31 years old last fall. During that time the mission of the organization has remained the same. Simple, to the point and yet so important to the continued development of our community.

While we depend heavily on Houston and the success of the metropolitan economy, we also compete directly with other local areas for a dominant share of population, economic and employment growth.

As we grow in size as a community, we must stay true to these ideals for as the Good Book says a ‘house divided will not stand’, and what differentiates us from others will be lost.

Jeffrey C. Wiley
PRESIDENT & CHIEF EXECUTIVE OFFICER

Our competitive and comparative advantage is determined by a number of factors such as: (1) quality of life; (2) educated workforce; (3) quality of our schools; (4) affordable, high quality housing; (5) our business climate; (6) infrastructure sufficient to sustain growth and maybe most importantly, (7) the ability to work together between public, private, philanthropic and non-profit entities to drive continued high quality growth to our community.
GREATER FORT BEND ECONOMIC DEVELOPMENT COUNCIL

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Fiscal Year 2018 was a good year of development, especially considering the impacts of Hurricane Harvey and its aftermath. This, added to the continuing glut of commercial office space in the Houston market, has led to more industrial focus development. Commercial projects continue to have longer than normal close cycles, although this is the new normal. The abundance of office sublease space caused by downsizing of energy companies throughout the region has made speculative projects all but disappear except in certain industrial applications. On a positive note, Fort Bend’s office and industrial occupancy rates are strong and when space is available, there is strong demand.

This year we closed on deals representing $184 Million in new capital expenditures related to 1.3 Million square feet of new commercial construction projects with associated new jobs of 567 and retained jobs of 221.

The Pipeline

While the absolute level of pipeline deals and projects have shrunk since last year, the onsets that it identified this year have a much more probable chance of closing. There are two probable deals in process already with Accreto and FR Solar which we hope to close during the first quarter of next fiscal year. There are also fewer state prospects which experience has shown to be highly important as a source of expansion and relocation. However, the more sites sit as clear as to ready for construction the better positioned we are to compete for those deals in the future.

Mixed Use Development

Finally, this year the City of Stafford agreed to an incentive agreement with the developers of the former TI site signaling the start of a robust marketing and lease incentive agreement with the developers of the former TI site through the Brazoria Fort Bend Rail District to connect Port Freeport with Rosenberg and the Three Class 1 railroads. These 4 areas represent the foundation of making west and central Fort Bend an island port and logistics center of excellence.

Education

On the education front, the FBEDC continues to play an active role in the tracking and assessment of the prior facility bond programs. As the primary business partner for ongoing accountability, not only when a bond program is proposed, but throughout the campaign, the FBEDC has worked strongly with our largest districts, Fort Bend ISD, to balance the interest of providing facilities sufficient to sustain growth, maintain or lower tax rates and increase educational excellence.

Federal Initiatives

Federal issues remain front and center on the agenda. Of particular note is the Bipartisan Budget Act of 2018 (BBA 18) which provides disaster relief funding sources for States and Territories impacted by natural disasters over the past three years. The omnibus spending bill recently signed into law extends the NFIP’s authorization until July 31. This new deadline comes immediately before the August Congressional recess and falls as we enter the height of hurricane season, meaning pressure to reauthorize without a lapse will be high. This July 31 date, which is coupled with the NFIP from the omnibus spending bill, increases pressure on the Senate Banking Committee to produce legislation, as the House has already acted.

Fort Bend Marketing Program

Fort Bend County’s marketing program continued to lead the way with video intensive productions creating a feature video focusing specifically on K-12 education, mixed use development, and Hurricane Harvey relief efforts in Fort Bend. In addition, the program featured technology company outreach effort featuring several short video pieces in a testimonial format with HCSS’s Tom Webb. These video pieces were heavily on social media and the Fort Bend County website, pumped up through significant search engine marketing efforts and website optimization.

Insider Business & Retention

Our results this year were similar to last year. We achieved the annual production objectives set forth by our executive leadership. Not listed but of note is the final piece of the puzzle that will allow the TI site redevelopment project to go forward. As always, city economic development partners and the FBEDC work aggressively together to drive these results. Partnerships are key to our economic growth story.

Highlights:
- Our two large industrial deals this year (Best Buy and Ridge Development) represent nearly 1 million sf of new industrial warehouse capacity.
- The TI redevelopment opportunity represents nearly $500M in new development as well (not reflected in the deal numbers below).

Completed Deals

<table>
<thead>
<tr>
<th>Number of New Jobs:</th>
<th>Number of New Jobs:</th>
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</thead>
<tbody>
<tr>
<td>251</td>
<td>350</td>
</tr>
</tbody>
</table>

New Commercial Square Feet: Total Commercial Square Feet: $1,286,000 $2,479,000

Total Capital Investment: Total Capital Investment: $1,286,000 $2,479,000

2017/2018 Completed Deals

<table>
<thead>
<tr>
<th>Name</th>
<th>Cap XSM</th>
<th>Number of New Jobs:</th>
<th>Number of Retained Jobs:</th>
<th>Total Capital Investment:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best Buy</td>
<td>80</td>
<td>251</td>
<td>350</td>
<td>$1,286,000</td>
</tr>
<tr>
<td>TekManna</td>
<td>12</td>
<td>30,000</td>
<td>61</td>
<td>$2,479,000</td>
</tr>
<tr>
<td>Ridge SW</td>
<td>40</td>
<td>12,000</td>
<td>61</td>
<td>$1,286,000</td>
</tr>
<tr>
<td>Bronson Solar</td>
<td>10</td>
<td>12,000</td>
<td>61</td>
<td>$2,479,000</td>
</tr>
<tr>
<td>Nature’s Best</td>
<td>6</td>
<td>35,000</td>
<td>61</td>
<td>$1,286,000</td>
</tr>
<tr>
<td>Comcast</td>
<td>6</td>
<td>35,000</td>
<td>61</td>
<td>$2,479,000</td>
</tr>
<tr>
<td>Warren Valve</td>
<td>18</td>
<td>62,000</td>
<td>61</td>
<td>$1,286,000</td>
</tr>
<tr>
<td>Total</td>
<td>184</td>
<td>1,286,000</td>
<td>818</td>
<td>$2,479,000</td>
</tr>
</tbody>
</table>

818 jobs impacted includes 567 new jobs projected and 251 retained jobs saved through expansion in the local market.

2018 Top 10 List

1. Capital Expenditure, Commercial Space Add and New and Retained Jobs
2. The Pipeline
3. Advancement of Mixed Use Development
4. Fort Bend Marketing Program
5. 86th Legislative Session
6. Operations and Fiscal Responsibility
7. Infrastructure
8. Education
9. Federal Initiatives
10. Houston Stronger

The engagement has begun on issues to be addressed in the 86th Legislative session. Written testimony was provided to the House Committee on Government Operations and Transparency in the matter of the GRP Supreme Court Decision on open records. Property tax cap, Hurricane Harvey funding via Rainy Day Fund, and the state’s ability to open records are primary issues that will again be debated in the coming session.

In addition, like all sessions, attacks on special districts, economic development corporations, economic development incentives, toll roads will certainly reappear. The FBEDC will continue to play an active role in fighting legislation harmful to our growth prospects and confidential treatment of clients.

10 Highlights

- Houston Stronger

Finally, we are working with a new 10114 created after Hurricane Harvey focused on current and future regional development redevelopment, the group is Harris Plus and the Brand is Houston Stronger. Its first tasks are focused on the development of a Harris County Bond Resolution

Our Pipeline remains strong with a good mix of probable and potential deals that will set the stage for growth opportunities in the coming fiscal year. Some of these prospects are local expansions while others are regional and state prospects. Locally sourced deals generally have a stronger probability of closing. However, regional and state deals tend to be larger opportunities.

Last year we started the process of discussing tracts in central and West Fort Bend County available for commercial and industrial development, some of which are reflected in the prospect list below. Solar deals have surfaced that provide an opportunity for productive use of the land in a non-agricultural setting that produce tax revenues and capital dividends for the property owners while infrastructure build and the market matures. This coming year’s focus will increasingly be directed toward building inventory of small, mid and large tract property portfolios and underlying infrastructure deficiencies and a plan to begin to make them development ready.
Best Buy Regional Distribution Center
Best Buy chose Beltway Crossing in Missouri City as the site for its newest e-commerce distribution facility. Located at the southwest corner of the US 90A and Beltway 8 interchange, the building will be a minimum of 500,000 sf with a total capital investment of over $80 million of land, building, equipment, machinery, and inventory.

New direct jobs will total 40+ with 100+ contract jobs created for delivery services. This building is the first in Fort Bend of such large, e-commerce distribution ‘boxes’ for lease which is the most in-demand product in the Greater Houston market, owing to the ‘Amazon Trend’ in distribution real estate. The GFBEDC and the City of Missouri City both provided property tax abatements with the city also creating the reinvestment zone.

Ridge Development \ Southwest Commerce Center
Ridge Southwest, the development arm of Transwestern, is building Southwest Commerce Center off the southeast corner of the US90A and Beltway 8 interchange in Missouri City. This new development project is 477,000 sf ‘large box e-commerce’ type distribution facility with a capital investment of over $40 million. This facility will support 75 or more new direct jobs. As with the Best Buy building, this is the most ‘in-demand’ industrial type of property in Greater Houston. The City of Missouri City provided property tax abatements and created the reinvestment zone. The GFBEDC facilitated property tax abatements from Fort Bend County and the Fort Bend County Drainage District.

Warren Valves\Allied Group
The third building in the Allied Cos. campus in Lakeview Business Park in Missouri City will bring its group of companies total footprint in Missouri City and Fort Bend County to over 700,000 sf, creating 20+ new direct jobs, 251 retained jobs, and a total capital investment of over $150 million.

This third building represents a 200,000 sf building and a total capital investment of $16 million with a to-be-determined significant expansion of inventory. On Bldgs. 1 and 2, initial annual inventory exceeded $25 million. The City of Missouri City provided property tax abatements and created the reinvestment zone. The GFBEDC facilitated property tax abatements from Fort Bend County and the Fort Bend County Drainage District.
NatureBest
NatureBest, a fruit and vegetable processing and distribution business, will be leasing space in a 62,000 sf Trammel Crow building in Park 8Ninety representing a base building, build-out, and personal property value of over $6.5 million. Nature Best will bring 115 new direct jobs to Missouri City and Fort Bend County. The City of Missouri City provided property tax abatements and created the reinvestment zone. The GFBEDC facilitated property tax abatements from Fort Bend County and the Fort Bend County Drainage District.

Comcast Missouri City Service Center
Comcast will be occupying a new 35,000 sf building built by Trammell Crow in the Park 8Ninety Business Park in Missouri City at the southeast corner of US90A and Beltway 8. The shell, build-out of the building, equipment, machinery, and inventory will exceed $16 million. This facility and equipment will support service technicians that represent 255 new direct jobs to Missouri City and Fort Bend County. The City of Missouri City provided property tax abatements and created the reinvestment zone. The GFBEDC facilitated property tax abatements from Fort Bend County and the Fort Bend County Drainage District.

Bronson Solar LLC Solar Farm
At the southwest corner of US 90A and FM 1875 (Beasley West End Rd.) on 93 acres in western Fort Bend County, Bronson Solar is constructing a $12 million capital investment solar panel generating facility that will produce 10Mw (enough to power 400 to 500 area homes and small businesses) connected directly to CenterPoint Energy's Distribution lines and providing a renewable, competitively priced, environmentally-friendly source of electricity primarily to residential markets. The additional power capacity and the competitive nature of it, helps balance out that only 1 new direct job will be created. Also, such a facility will have virtually no demand on county services.
Stafford TI Redevelopment
Located at the former TI Site in Stafford, the 192 acres include more than 350,000 square feet of shops, restaurants, and entertainment, 500,000 square feet of creative-focused office space; multiple hotels; pop-up shops; food hall; rooftop dining and 2,400 urban residences. The heart of the project incorporates existing components of the site’s iconic industrial architecture to create an authentic and memorable urban environment, including an activated public green space able to host concerts, festivals, and outdoor movies. Public private partners on this deal include the developer, Streelevel, East Fort Bend Development Authority, WCID No. 2, City of Stafford and Fort Bend County. The GFBEDC assisted the creation of the local government corporation and incentive agreements between the parties.

Katy Boardwalk
The Katy Boardwalk District is a public private partnership engaged in development of a 44-acre project that will include 650 modern loft residences, 145,000 square feet of commercial space, 60,000 square feet of retail space, a conference center and a hotel. Original plans call for the conference center to be 73,000 square feet and the hotel to be 204,000 square feet.

The TIRZ, originally established through the assistance of the GFBEDC which provided the 3P partnership to build Katy Mills Mall project, has been extended to continue this successful partnership between public and private entities to build enhanced high quality development in the City of Katy and Fort Bend County.

TekManna
TekManna is a four-year-old biotechnology firm ready to move into production of its first product and build its first facility which will be a major non-traditional agricultural business and job generator located in the Needville ETJ. Their initial product is a highly-in-demand true superfood, the nutritional supplement, chlorella, an algae species currently imported from Asia to meet U.S. domestic market requirements. TekManna will be the only commercial producer of this product in the U.S. and they will produce private party label brands available on the shelves of major U.S. grocery retailers.

The GFBEDC assisted TekManna by helping Fort Bend County in creating a reinvestment zone, and then managing and structuring the approval process of property tax abatements from Fort Bend County and the Fort Bend County Drainage District.
OFFICE MARKET

The regional office market continues to work off the overly-publicized supply of energy-related sub-lease space, but Fort Bend’s top office sub-markets, Katy and Sugar Land, continued to experience high occupancies and demand, and competitive rental rates.

As population and job potential in Fort Bend continues to increase, and as Class B office product in nearby Tier 2 submarkets decline, the demand for new Class A space closer to home strengthens.

Although new development was subdued, traditional new office buildings and mixed-use projects are proposed and plans are drawn up, just waiting for the right timing and sufficient pre-leasing to trigger arranged financing.

Both the GRID (multi-use redevelopment of the TI site in Stafford) and the Katy Boardwalk (multi-use project next to Katy Mills Mall) have started construction. These two projects will be gold stars on the real estate community’s maps, as will Telfair’s proposed multi-use center next to UH Sugar Land and the proposed new Fluor Campus. Pin Oak Park in Katy was recently acquired by a developer who is expected to create another multi-use center on the north side of IH10/Pin Oak Rd.

With Fluor’s relocation to US59/IH69 and University Blvd., 1.2 million sf of space will be repurposed or released at their current facility at Lake Point in First Colony, where several other new Class A buildings are proposed in the 150,000+ sf size. Sugar Creek Office Park also has space for several proposed mid-to-high rise buildings.

INDUSTRIAL MARKET

The Industrial market continues to be the most active and healthiest commercial market segment in Fort Bend and the region. Missouri City continues to see the most activity through its developed sites in and around Trammell Crow’s Park8 Ninety and the M4/Gulf Equities Beltway Crossing. Lakeview Business Park has sold out, and in-fill tracts in Sugar Land and Stafford are scarce.

The construction of US59/IH69 has temporarily slowed new activity in Central and West Fort Bend County including planned construction of sold sites. However, with the highway construction nearing its completion in the next 24 months, timing and interest on new deals begins to align with Highway completion. Several significant prospects have been inquiring about the parks such as Rosenberg Business Park recently.

The Rosenberg/Triple Fork area is ideal for a major industrial center to emerge among the three Class A railroads and three major highways. However, it is in dire need of larger ‘shovel ready sites’ for a single company’s operations or for a developer to tap into the future of the Rosenberg Inland Port concept and develop rail-served business parks for large, multi-tenant distribution centers. Promoting and identifying the resources needed to create shovel-ready-sites in this area continues to be a priority of the EDC.

Leasing activity in smaller to medium sized requirements remain very robust in existing and spec properties. However, the ‘Amazon Trend’ of much larger distribution spaces to be leased, rather than owned, continues to be the major influence of the sector. FBC, as well as traditional industrial areas in Harris County, are running very short on closer-in sites large enough for these ‘Amazon Trend’ facilities. We will be competing more and more with Waller County which enjoys both IH 10 and US 290 access.
Fort Bend Marketing Program

Why do we have a Fort Bend Marketing Program (FBMP) for the county? It’s a good question. The answer is quite simple. Fort Bend markets at the county level because we have a competitive and comparative advantage against all other counties in the Houston region. When it comes to things that matter like quality of life, good governance, safe communities, an educated and skilled workforce, and demographics of our people, Fort Bend leads the way for the Houston Region. This program is a public private partnership that works to set our community apart and impact and bring businesses, new quality development, infrastructure and families to our community. We refine the program each year and work to improve the program and metric tracking that monitors program success.

Paid Facebook Advertising

- Total Impressions- 1,932,159
- Total Engagement- 825,463
- Engagement Rate- 43%

The FBMP engaged in an aggressive digital media campaign in FY2018, which focused primarily on paid video posts via Facebook as an efficient outreach effort to specifically targeted audiences. The video messaging was impressed on nearly 2 million Facebook feeds, and resulted in above industry standard engagement rate which measures posts’ likes, views, comments, and shares.

Facebook Paid Video Advertising

In an effort to drive traffic to our website, the FBMP increased funding in January for the search engine marketing component of the campaign. The purchase of key words and ad placement with Google drove traffic to the site in large numbers. Our Google advertisements based on specific key words presented over 700,000 times, and when presented to users, presented in the highest position. Our impression share continues to be low, indicating room to grow this side of the campaign.

Google SEARCH!

- Impressions: 708,403
- Website Clicks: 26,630
- CTR: 3.7%
- Average Position: 1.2

*All totals based on data accumulated from July 1-April 30

Define It!

- Impressions: How many times ad was presented
- Clicks: How many times ad was clicked

Video Centric

Continuing the efforts from FY2017, the FBMP remained focused on creating quality video content. Video messaging this fiscal year focused on the county’s impressive mixed use centers, attracting technology companies, quality education, and the county’s resiliency following Hurricane Harvey.

To ensure an efficient use of critical branding dollars, the FBMP initiated a Google analytics program in FY2018 to report both paid and organic website clicks. This detailed reporting offered us the data necessary to tailor the website content to meet the users’ needs while modifying our search and branding efforts based on real data and user experiences. The analytics indicate the strategy is working, with visitors viewing our home page, data page, and living pages most frequently, spending above average time on each.

To ensure user experience remains productive, which enhances the site’s Google ranking on organic search efforts, the FBMP completed a website optimization program, developing the proper backend tagging and branding necessary to create user efficiency.

Website Analytics

- Home Page: 27,064 Visitors 1:16 Avg Time
- Data: 16,184 Visitors 3:35 Avg Time
- Living & MPC: 6,717 Visitors 4:42 Avg Time

13,945 From Houston, Highest Origination City
Numbers That Excel

**POPULATION AND EMPLOYMENT**

Fort Bend’s Labor Force continues to grow although not as fast as in previous years, with just under 1% annual growth in covered employment, based on BLS data. While growth is positive, the composition of jobs has shifted with losses in Natural Resources & Mining, Construction and Manufacturing and gains in Information, Financial Activity and Professional and Business Service as of the latest reporting period of 3Q, 2017.

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:

<table>
<thead>
<tr>
<th>Category</th>
<th>Fort Bend County</th>
<th>Peer County</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population Growth</td>
<td>195,742</td>
<td>765,828</td>
<td>US Census</td>
</tr>
<tr>
<td>Average household Income</td>
<td>$36,930</td>
<td>$184,828</td>
<td>TAMU Real Estate Center</td>
</tr>
<tr>
<td>Total Employment</td>
<td>82,300</td>
<td>345,091</td>
<td>TAMU Real Estate Center</td>
</tr>
<tr>
<td>Est # Jobs in Fort Bend County</td>
<td>44,045</td>
<td>308,000</td>
<td>TAMU Real Estate Center</td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>10.7%</td>
<td>4.78%</td>
<td>TAMU Real Estate Center</td>
</tr>
<tr>
<td>Poverty Rate</td>
<td>12.5%</td>
<td>9.2%</td>
<td>US Census</td>
</tr>
</tbody>
</table>

**REGIONAL CRIME DATA**

Fort Bend continues to lead the region for the lowest regional crime incidents per 1,000 population. Overall regional crime incidents per capita are trending down. Fort Bend has maintained its leadership role in this important statistic for all but one year over the past decade.

Fort Bend’s population stands at 765,000 people as of 2017 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.

Last year Fort Bend grew faster than any other county in the region averaging 3.1% year over year growth. Considering its base population is greater than any other county except Harris County, Fort Bend continues to gain a disproportionate amount of growth coming to the region.

Over the last 7 years Fort Bend has averaged nearly 31% growth in its population doubling the growth experienced by all but 3 of its peer counties in the region with only Montgomery County surpassing 20% and being a full five percent behind in growth with a lower population base.

Fort Bend’s Labor Force continues to grow although not as fast as in previous years, with just under 1% annual growth in covered employment, based on BLS data. While growth is positive, the composition of jobs has shifted with losses in Natural Resources & Mining, Construction and Manufacturing and gains in Information, Financial Activity and Professional and Business Service as of the latest reporting period of 3Q, 2017.

```
<table>
<thead>
<tr>
<th>Category</th>
<th>Fort Bend County</th>
<th>Peer County</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population Growth</td>
<td>195,742</td>
<td>765,828</td>
<td>US Census</td>
</tr>
<tr>
<td>Average household Income</td>
<td>$36,930</td>
<td>$184,828</td>
<td>TAMU Real Estate Center</td>
</tr>
<tr>
<td>Total Employment</td>
<td>82,300</td>
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<tr>
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<td>12.5%</td>
<td>9.2%</td>
<td>US Census</td>
</tr>
</tbody>
</table>
```
**County Employment Data**

The rate of unemployment in Fort Bend County was unchanged at 4.4 percent in February, down nearly one percentage point from a year earlier. The rate of unemployment at the state and national levels dropped one-tenth of a percentage point in February to 4.1 percent and 4.4 percent respectively. Total covered employment in the county was up 2,888 jobs over second quarter 2017. The 1.6 percent increase was weaker than an average 2.1 percent increase over the last ten years. The largest increase was in Leisure & Hospitality, up 1,029 jobs or 4.2 percent, with the strongest increase found in Other Services, up 575 jobs or 10.4 percent. Total covered employment in the county was up 4,146 jobs over the year with the pace of job growth at 2.4 percent, down slightly from 2.8 percent in first quarter 2017. Much of new jobs were in Trade Transportation & Utilities, up 1,882 jobs or 5.2 percent, and Education & Health Services, up 1,829 jobs or 6.9 percent. The strongest increase was in Other Services, up 727 jobs or 3.5 percent. Losses related to weak oil prices continued to be found in Manufacturing and Natural Resources & Mining with additional declines found in Construction and Government. See page 2 for detailed data.

<table>
<thead>
<tr>
<th></th>
<th>FEB 2018</th>
<th>JAN 2018</th>
<th>FEB 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Civilian Labor Force</td>
<td>377,218</td>
<td>371,875</td>
<td>369,292</td>
</tr>
<tr>
<td>Total Employment</td>
<td>360,805</td>
<td>355,525</td>
<td>349,767</td>
</tr>
<tr>
<td>Unemployed</td>
<td>16,413</td>
<td>16,330</td>
<td>19,525</td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>4.4%</td>
<td>4.4%</td>
<td>5.3%</td>
</tr>
</tbody>
</table>

**Comparative Actual Rates**

- Texas: 4.1% (FEB), 4.2% (JAN), 4.8% (FEB)
- U.S.: 4.4% (FEB), 4.5% (JAN), 4.9% (FEB)

**Unemployment Rate**

- Fort Bend County: 4.4% (FEB), 4.3% (JAN), 5.0% (FEB)
- Texas: 4.1% (FEB), 4.2% (JAN), 4.8% (FEB)
- U.S.: 4.4% (FEB), 4.5% (JAN), 4.9% (FEB)

*Estimates reflect actual (not seasonally adjusted) data. Civilian Labor Force includes wage and salary workers, self-employed, unpaid family, domestics in private households, unpaid workers, workers involved in labor disputes and the unemployed, all by place of residence. Covered employment data compiled from 2nd quarter 2017 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.

**COVERED EMPLOYMENT**

<table>
<thead>
<tr>
<th>Industrial Sector</th>
<th>2ND QTR 2017</th>
<th>1ST QTR 2017</th>
<th>2ND QTR 2016</th>
<th>Actual %</th>
<th>Actual %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Employment</td>
<td>178,214</td>
<td>175,326</td>
<td>174,068</td>
<td>2,888</td>
<td>1.6%</td>
</tr>
<tr>
<td>Natural Resources &amp; Mining</td>
<td>5,269</td>
<td>5,279</td>
<td>5,012</td>
<td>-10</td>
<td>-0.3%</td>
</tr>
<tr>
<td>Construction</td>
<td>11,105</td>
<td>11,126</td>
<td>11,908</td>
<td>-23</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>13,011</td>
<td>12,871</td>
<td>13,274</td>
<td>-140</td>
<td>-1.1%</td>
</tr>
<tr>
<td>Trade, Transportation, &amp; Utilities</td>
<td>37,778</td>
<td>37,532</td>
<td>35,896</td>
<td>-246</td>
<td>-0.7%</td>
</tr>
<tr>
<td>Information</td>
<td>1,981</td>
<td>1,953</td>
<td>1,767</td>
<td>-48</td>
<td>2.5%</td>
</tr>
<tr>
<td>Financial Activities</td>
<td>6,729</td>
<td>6,617</td>
<td>6,522</td>
<td>112</td>
<td>1.7%</td>
</tr>
<tr>
<td>Professional &amp; Business Services</td>
<td>19,869</td>
<td>19,740</td>
<td>19,227</td>
<td>129</td>
<td>0.7%</td>
</tr>
<tr>
<td>Education &amp; Health Services</td>
<td>28,154</td>
<td>27,597</td>
<td>26,325</td>
<td>557</td>
<td>2.0%</td>
</tr>
<tr>
<td>Leisure &amp; Hospitality</td>
<td>25,599</td>
<td>24,579</td>
<td>25,279</td>
<td>1,029</td>
<td>4.2%</td>
</tr>
<tr>
<td>Other Services</td>
<td>6,113</td>
<td>5,538</td>
<td>5,386</td>
<td>757</td>
<td>10.4%</td>
</tr>
<tr>
<td>Nonclassifiable</td>
<td>297</td>
<td>290</td>
<td>125</td>
<td>47</td>
<td>18.8%</td>
</tr>
<tr>
<td>Public Administration</td>
<td>24,312</td>
<td>24,274</td>
<td>24,685</td>
<td>38</td>
<td>0.2%</td>
</tr>
<tr>
<td>Federal Government</td>
<td>752</td>
<td>753</td>
<td>713</td>
<td>-1</td>
<td>-0.1%</td>
</tr>
<tr>
<td>State Government</td>
<td>2,715</td>
<td>2,827</td>
<td>2,784</td>
<td>-112</td>
<td>-4.0%</td>
</tr>
<tr>
<td>Local Government</td>
<td>20,845</td>
<td>20,694</td>
<td>21,188</td>
<td>151</td>
<td>0.7%</td>
</tr>
</tbody>
</table>

**Avg Weekly Wage**

- Total Employment: $1,022
- Natural Resources & Mining: $5,205
- Construction: $1,998
- Manufacturing: $1,615
- Trade, Transportation, & Utilities: $830
- Information: $1,224
- Financial Activities: $1,579
- Professional & Business Services: $1,354
- Education & Health Services: $700
- Leisure & Hospitality: $356
- Other Services: $589
- Nonclassifiable: $631
- Public Administration: $964
- Federal Government: $1,241
- State Government: $847
- Local Government: $966

Creating the right business climate requires the development of important community attributes that work to provide a competitive edge in facilitating commercial, residential, population and workforce growth. We diligently pursue and highlight four foundational attributes that set the table for positive growth in our area. These attributes position Fort Bend County favorably in the Greater Houston region.

**Pro-Business**

Corporate expansion and relocations are the cornerstones of growing successful communities. Fort Bend began its growth cycle because the 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.

**Proximity**

Fort Bend County’s proximity to the Greater Houston region is essential in promoting local tax and entertainment centers, seaports and airports.

**Education**

When we sit down with companies interested in our community, we 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.

**Cooperation**

Our companies 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, we 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.

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

**HOW WE DO IT**

**Public Private Partnership**

FNBC is a Public Private Partnership, where corporations, local governments, and residents work together to improve the community.

**Membership:**

193 Members as of 6/30/2018

**ADVOCACY FOR GROWTH**

**HOUSTON STRONGER**

Houston Stronger is a coalition of civic groups, business associations and active citizens from throughout the Texas Gulf Coast region dedicated to working with local, state and federal officials to implement a comprehensive regional flood control plan that safeguards our citizens and property and help our entire region meet or exceed the 100-year flood plain standard. It is time for immediate action to finish the job that area leaders started to address in the 1940s, and fix our drainage and flooding issues once and for all. The GFBEDC is a founding member of this group.

**BRAZOS RIVER EROSION MITIGATION (BREM)**

BREM is one of the identified priorities in the Houston Stronger Flood Resiliency Plan and is one of Fort Bend County’s most important priorities in the area of flood resiliency. The erosion impacts of substantial flooding events in recent years has accelerated erosion and threatened parts of the county beyond its original scope when initially made a project under the US Army Corps (Historic Richmond). The BREM scope is now a comprehensive look throughout Fort Bend County of the Brazos River on health, life, safety and protection of substantial taxable value and property.

**WATER OF THE UNITED STATES (WOTUS)**

The GFBEDC participated in the 2015 WOTUS rulemaking process, and remains a party to litigation through TARGET.

**NATIONAL FLOOD INSURANCE PROGRAM (NFIP)**

The availability of affordable flood insurance and the recognition of local flood mitigation efforts in the rate risk profile remains one of the most important competitive issues for our community. We continue to work with Fort Bend County Judge Robert Hebert, our Congressional representatives, Fort Bend Flood Management Association and the multi state Coalition for Sustainable Flood Insurance as NFIP reauthorization is considered in 2018.

**THE TEXAS 86th LEGISLATIVE SESSION**

The 86th legislative session looks to largely be a repeat of the 85th with the same contentious issues tee’d up for redress. Among those matters most impactful to our mission are:

- TPIA (85th leg SB 407/HB 792)
- TPIA (85th leg SB 408/HB 793)
- TBI2 (85th leg SB 650/SB 1755)
- Ad valorem taxes, roll back elections (85th leg B 21 HB 15)
- Hurricane Harvey funding
- Attacks on MUDs

**OPPORTUNITY ZONES**

The GFBEDC, working with the County Judge and the Industrial Development Corporation and fellow economic development directors, pursued and were awarded designation of multiple Opportunity Zones that will allow new incentives for capital investment in historically underemployed areas and census tracts.
Community Bank of Texas
Continental Polyskaps
Costello, Inc.
D.E. Harvey Builders, Inc.
DAC Engineering
Dannebaum Engineering Corporation
Dimension Energy Services
E.E. Reed Construction, LLC
EHRA Engineering
ELFIN Development, Inc.
Emerson Automation Solutions Final Control US LP
Entrust Inc.
Excalibur 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 WC & ID No. 2
Fort Bend Independent School District
Fort Bend Industrial Development Corp
Fort Bend MUD #18
Fort Bend Subdivision District
Frito-Lay, Inc.
Frost Bank
Fulshear Area Chamber of Commerce
GeoAnalytics
Geotest Engineering, Inc.
Gulf Coast Water Authority
Half Associates
Harrision Interests, Ltd.
Heavy Construction Systems Specialists
Helix Infusion Therapy
Hexion, Inc.
Hilltop Securities
Holloway Jones Law Firm LLC
Houston Community College System, SW
Houston Landscapes Ultd.
Houston Methodist Sugar Land Hospital
Houston Southwest Airport
HR Green
HR In Alignment, LLC
Hudson Products '1Chart Industries
Huitz-Zollars, Inc.
ICD Commercial
Icon Bank
ICDUS Inc
IDS Engineering Group
Imperial Linen Services, Inc.
Interiorscapes of Houston
Johnson Development Corporation, LP
Kansas City Southern
Katy Area Chamber of Commerce
Katy Area Economic Development Council
KDOW - Kingham Dalton Wilson
Kelsey-Seybold Clinic
KenWood & Associates, P.C.
Lamar Consolidated ISD
Legacy Ford
Lendlease
Linbeck Group
Linebarger Goggan Blair & Sampson, LLP
LJA Engineering, Inc.
LowerBank
M.D. Anderson Cancer Center - Sugar Land
McDonald & Wessendorf Insurance
Memorial Hermann Sugar Land Hospital
Mission Entrust Investors LP
NALCO Champion
NewFirst National Bank
Newland Communities
NewQuest Properties
Niagara Bottling, LLC
OakBend Medical Center
Odyssey Engineering Group, LLC
Old Republic National Title
Pamela Printing Company
Paradigm Consultants, Inc.
Perdue Brandon Fielder Collins & Mott
Perry Homes
Piper Bank
Planned Community Developers
Port Freepost
Professional Service Industries, Inc.
Prestonity Bank
QuVa Pharma Inc.
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
Roberts Markel Weinberg Butler Hailey PC
Riverpark on the Brazos, TX
Rosenberg Construction, LP
SBP Infrastructure, Ltd.
Safan Texas
Schlumberger
Si Energy, L.P
Si Environmental
Sienna Plantation LID
Sienna Plantation MUD #1
Sienna Plantation MUD #2
Simpkins Group, Inc.
Southwest Electronic Energy Group

Spirit of Texas Bank
Sprint Fort Bend County Landfill, LP
St. Luke's Sugar Land Hospital
Stafford S9 & Airport, LP
Stafford Municipal School District
Stancil Property Tax
Star Gessner Properties, Ltd.
Stewart Title Company
Stonehenge Companies, LLC
Storm Water Solutions, LLC
Suebs USA
Sugar Land Baseball (Sugar Land Skeeters)
Sweetwater Country Club
Tax Tech, Inc.
Taylor Morrison of Texas, Inc.
TDCECU
Teplexens
Terracoe, Inc.
Texas Instruments
Texas State Technical College
The Hunton Group
The Irwin Law Firm, P.C.
The Mills Group, Inc.
The Muller Law Group, PLLC
Toll Brothers
Tolunay-Wong Engineers, Inc.
Trompewell Crow Company
Tramontina USA, Inc.
TransSystems Corporation Consultants
Tristar Holdings, Inc.
Turner Duran Architects, LP
Twinstar Bakery
Twinwood U.S., Inc.
U.S. Congressman Pete Olson
Union Pacific Railroad
University of Houston Sugar Land
Van De Weele & Vogler Engineers
Ventana Land Development Companies
Volunteer Services Council of Richmond SSLC
Warren Alloy
Wharton County Junior College
Whiteley Penn LLP
WJ Interests, LLC
Witham Mill - Benefits & Risk Mgmt