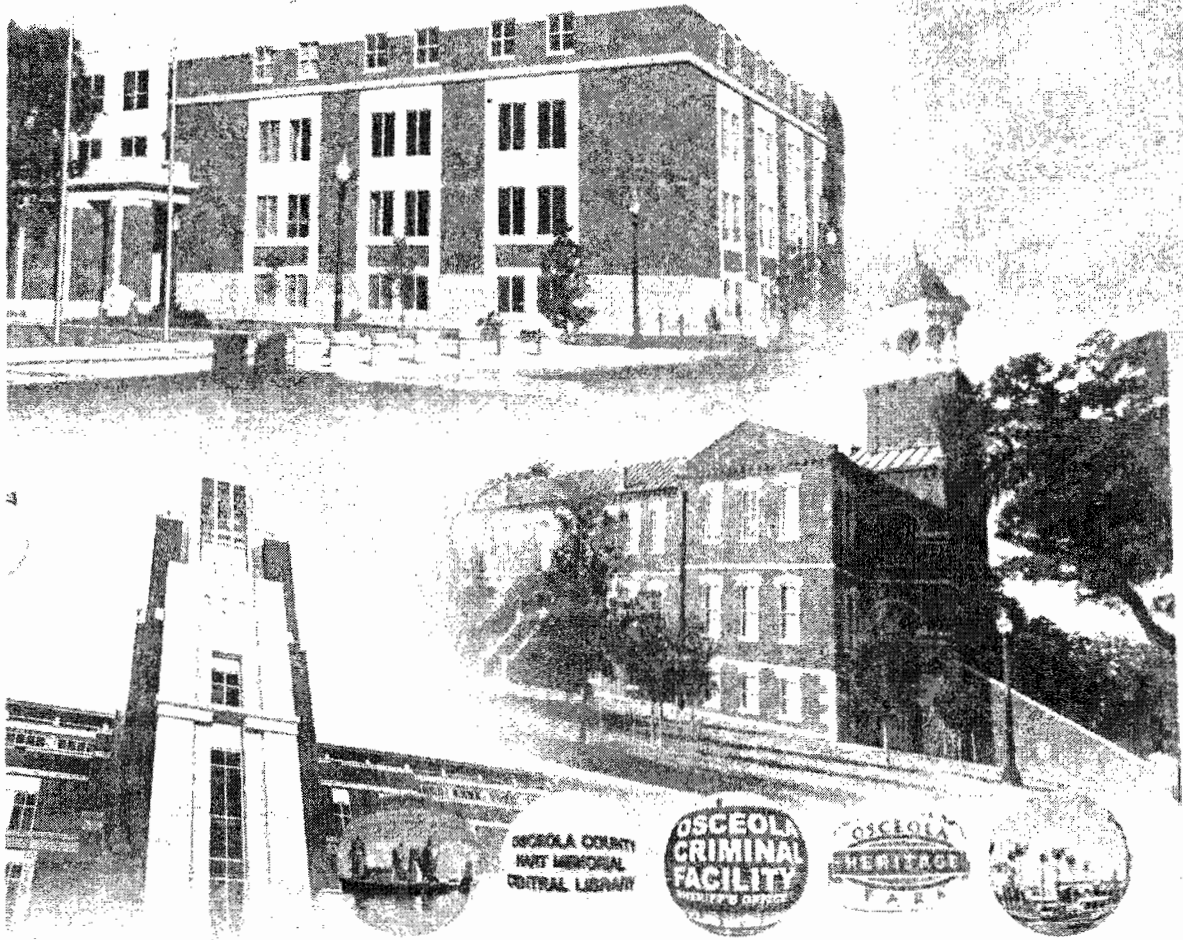


Osceola County Comprehensive Plan

Economic Development Element Data & Analysis

ECONOMIC DEVELOPMENT ELEMENT DATA & ANALYSIS



OSCEOLA COUNTY COMPREHENSIVE PLAN 2025

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CHAPTER SIXTEEN

ECONOMIC DEVELOPMENT ELEMENT (Section 163.3177(7)(j), F.S.)

A. INTRODUCTION

Osceola County is located in the heart of Central Florida, 22.3 miles South of Orlando, between Miami (225.6 miles) to the south, Jacksonville (162.2 miles) to the north, Tampa (76.4 miles) to the west and approximately 162 miles from the state capital of Tallahassee. The total land area of Osceola County is approximately 1,506 square miles (1,322 land and 184 water) in size.

Osceola County is known as the home of Walt Disney World and is a worldwide tourist destination. The County has experienced tremendous growth and economic activity over the past two decades due mainly to tourism. Seeing the need to have a diversified local economy, county leaders pressed in 1999 for the creation of an Economic Development Department. During the economic downturn in 2001-2002, the County further recognized the need to diversify the local economy to withstand market fluctuations. Because of the large amount of undeveloped land and its proximity to airports, railways and highways, Osceola County has excellent potential for future economic development.

Osceola County desires to create targeted economic diversification and growth. The County administers an economic development program to promote business and industrial growth in order to achieve a recession-resistant economy, better paying jobs, a reliable tax base and a better quality of life for its citizens. The County considers economic development to be a critical component of the County's plan for the future to ensure prosperity for all residents. The Economic Development Element of the Osceola County Comprehensive Plan is an optional element and not required by Chapter 163, Part II, of the Florida Statutes. However, this Economic Development Element is an integral part of the Comprehensive Plan and is not merely an isolated set of policies.

1. Purpose of the Element

The purpose of the Economic Development Element is to establish a framework for strategic economic enhancement for the citizens of Osceola County as part of the Comprehensive Plan. In planning for land use, transportation facilities and other services, economic development must be considered as part of the County's long-term goals in order to coordinate the targeted location and support for business and industry.

Economic development is defined as a strategic program to increase the standard of living and quality of life for County residents, stimulate job growth and provide higher-income jobs for residents, and diversify the local economy to provide stability and a growing tax base. Economic Development programs usually involve three subject areas: attracting new businesses to the local area, encouraging new business formation, and retaining and improving the success of existing companies.

2. History

Historically, Osceola County had an agriculture-based economy. However, the arrival of Walt Disney World in the 1970s led to the rapid growth of the tourism-based sector of the local economy. In recent years, the building industry has become an important sector as development demand has increased near Walt Disney World.

B. INVENTORY OF EXISTING CONDITIONS

1. Existing Economic Characteristics

While Osceola County is known worldwide as a tourist destination because of its proximity to theme parks, tropical climate, relaxed lifestyle, and eco-tourism. For these reasons, the County has excellent potential for attracting non-tourist businesses.

However, tourism is the current backbone of the County's economy with more than 46 million people visiting Walt Disney World annually. Support uses to the major attractions include the retail centers and hotel/motel units. Most of the hotel uses in Osceola County are located along U.S. 192. The retail uses attract both the business and tourist markets to their establishments.

The factors critical to Osceola County's economic growth are the continued growth rate, the cost of living and doing business in the County, the various forms of assistance provided by the County to targeted businesses, a central location with multi-modal transportation options, a wide variety of both pad ready and fully developed sites, and the vast selection of communities offering a variety of lifestyles.

As shown in Table 16-1, the existing County economy in terms of employment distribution is primarily comprised of retail and services (60.42 percent). The other sectors of the economy have less than six percent each of the total number of employees. This distribution illustrates how the existing regional economy is over-reliant on tourism.

The growth of the population in the region is evident in Table 16-2. In addition, population growth influenced the growth of the local and regional economy. Table 16-3 indicates the number of business start-ups in Osceola County (7,071 in 2004).

a. Major Employers in Osceola County

The largest non-agricultural employers are tourism, government, and healthcare sectors. The agricultural industries of forestry, citrus production and cattle

ranching are important to Osceola County. The following section provides an inventory of the agriculture-based sectors currently active in Osceola County.

1) Private Sector Employers

The primary private-sector employers found in Osceola County are tourism, service, healthcare and agriculture.

a) Non-Agricultural Private Employers

Walt Disney World, Central Florida's largest major attraction, covers 46 square miles of property in both Osceola and Orange Counties. Since Walt Disney World Magic Kingdom opened in 1971, Osceola County has experienced dynamic growth in the tourism industry. The Central Florida region has become the most popular tourist destination in the world with more than 66 attractions, 88,000 hotel rooms and 2,300 restaurants, with more being added daily. In 1996, a banner year for tourism in Central Florida, visitors pumped nearly \$15 billion into the local economy.

Tourism in Central Florida employs more than construction, defense, communications, or government. Tourism generates one out of every five jobs in the region. Combined, the annual earned wages of tourism generated \$1.7 billion in 1998, the bulk of which was spent in the local economy.

Walt Disney World was not included in the table of major employers because it straddles both Osceola County and Orange County. Walt Disney World employs approximately 55,900 people.

Major employers in Osceola County are varied and diverse. Primary private sector employers, besides Walt Disney World, are identified in Table 16-4.

Osceola County has several top-notch medical facilities, including Florida Hospital Kissimmee, Osceola Regional Medical Center, Celebration Health and St. Cloud Hospital. These state of the art medical facilities include an open-heart surgery center, a level two neonatal care unit, and air care team.

b) Silviculture

Silviculture is the practice of commercial forestry. This branch of forestry provides the scientific basis for the cultural treatment of forests with the goal of harvesting the wood for profit. According to The United States Department of Agriculture, Division of Forestry reports, Osceola County has approximately 181,500 acres of timberland, with 33,000 of those acres being government owned, and the other 148,500 being privately owned. In 2003, Osceola's Forest industry total output was \$80.8 Million and 1,291 people were directly or indirectly employed.

c) Agriculture

The agricultural industries of citrus production (\$34.5 million in 2002) and cattle ranching (\$19.9 million in 2002) are important economic sectors in Osceola County. Osceola County has more beef cows than any other county in Florida (75,000 in 2002). The economic impacts generated by these activities are considered substantial in the community. The income earned in these agricultural sectors of Osceola County supports a range of jobs elsewhere in the County's economy. Many secondary jobs are concentrated in the business and professional services sectors of agriculture.

2) Public Sector Employers

The public sector employs many people in Osceola County. The largest public sector employer in Osceola County is the Osceola County School District at 5,021 employees. Table 16-5 indicates the top public employers in the County.

b. Cost of Living Index

The cost of living in Osceola County is a bargain. Residents of Osceola County are below the national and regional average in Median Household Income, as shown on Table 16-7 and the Cost of Living Index and Historical Price Index as shown in Tables 16-8 and 16-9. Additionally, according to the University of Florida, Bureau of Economic and Business Research the average purchase price for homes in 2003 was \$150,832 in Osceola County, which is 6.84% lower than the Florida average. Furthermore, the median annual household income for Osceola County in 2005 is estimated to be \$41,872, as depicted on Table 16-7.

c. Cost of Business

There are many cost factors of doing business in Osceola County, including taxes and impact fees, wage rates, construction and rental costs, and utility rates.

1) Tax Rates

Tax rates are a cost to businesses and a factor considered by relocating businesses. Florida has a unique advantage when compared to other states because Florida has no state personal income tax. The Corporate Income Tax is at 5.5 percent. State sales tax is at 7.0 percent in Osceola County (see Table 16-10 for a local property tax rates and millage breakdown).

d. Labor and Employment Characteristics

1) Workforce Characteristics

Osceola County has a diversified and rapidly growing labor force. As stated earlier in this element, the County's population growth trends are shown in Table 16-2. With a below-average unemployment rate of 4.8 percent as depicted on Table 16-11, the County's current (2005) population is estimated to be 235,156, according to the University of Florida's Bureau of Economic and Business Research. Osceola County's age distribution of the population is shown in Table 16-12, with the bulk of the population (29.5%) within the 25-44 age group.

Many ethnic groups live in Osceola County, as indicated within Table 16-13. In addition, 57 different languages are spoken in the County. According to the 2000 U.S. Census, the Hispanic population is 29.4 percent of the total population. SRC, LLC estimates that this percentage has climbed to as much as 36.6 percent in 2005.

2) Educational Attainment

Osceola County enjoys a long tradition of excellence in education. Eleven Osceola Schools have earned the prestigious distinction of Five Star School by the Florida Department of Education for total community involvement in five areas: business partnerships, families, volunteers, student community service and school advisory councils.

However, Osceola County seeks to improve its educational attainment, or the number of students earning high school diplomas and advanced educational degrees. Table 16-14 indicates that almost 45 percent of Osceola County's adult population has completed at least some college.

Table 16-15 depicts the educational attributes of Osceola County, including high school graduation rate, student to teacher ratios and college entrance test scores. Educational attainment is a critical factor for Osceola County to improve in order to compete for higher-paying jobs within the region and state.

There are several college-level education institutions operating in Osceola County: the Technical Education Center of Osceola (TECO), Valencia Community College, and Stetson University at Celebration. TECO offers a wide range of specialized technical training and was conceived to help fill the need for a technically-trained employee base. TECO is one of the first educational institutions in the nation to offer a comprehensive Wireless and Computer Networking Technologies Program, beginning in the fall of 2001. The Postsecondary Education Planning Commission in Tallahassee awarded an \$800,000 Horizons Job Grant to TECO, in partnership with the Economic Development Department of the Osceola County Board of County Commissioners. Businesses, local governments, and experts from across the United States have committed to donate an additional \$1.7 million in equipment and resources to the new program. The continued collaboration of these partners will create a highly skilled workforce, as well as new job opportunities in an emerging technology field. Additional studies include culinary arts, legal and medical services, website design and business computer programming. The center offers a licensed practical nurse program and the Criminal Justice Academy.

Valencia Community College is an innovative leader in higher education with a national reputation for teaching excellence. With six campuses in the Orlando metro area, Valencia Community College is the third largest of Florida's 28 community colleges, teaching more than 50,000 students each year. Valencia Community College opened a fourth campus in 1997 in response to the growth in the Kissimmee area of Osceola County. Enrollment at the Osceola Campus grew to 6,775 students in 2005. The campus's second building is a \$4.9 million technology classroom and teaching lab, opened in Fall 2000. A third building housing technical science, information technology, and workforce development programs opened in January 2005. The campus offers a wide range of training and professional development programs for local residents and businesses, including information technology training.

Stetson University at Celebration is a recent addition to the higher-education facilities within Osceola County. Stetson University's Professional Development School (PDS) offers a master's degree in business administration, counseling education and teacher education. Stetson also provides advanced education in Microsoft certification, arts and fiduciary studies.

3) Employment Rates

The total number of persons employed in Osceola County in 2004 was 99,747. The unemployment rate in Osceola County is fairly average at 4.8 percent compared to the state of Florida (4.8%) and low as compared to the nation (5.5%). The 2005 projected employment growth in the County is 7.4 percent. The drop in the national and regional economy due to September 11th tempered this growth in 2001 when the growth rate dropped to 3.4 percent and the unemployment rate rose to 5.7 percent the following year.

e. Industrial and Office Locations

Industrial and warehouse space is currently readily available in Osceola County. Quality industrial and warehouse space in Osceola County is meeting demand. The current inventory of land and space may be exhausted within the next five to 10 years. The Future Land Use Element of the Comprehensive Plan includes a vacant land analysis. The County currently (2005) has 2,043 acres of industrial land. By the year 2025 Osceola County plans to have 3,887 acres of industrial land. With additional industrial land becoming available over the next 20 years, Osceola County will meet the projected demand.

Osceola County currently has a variety of industrial and warehouse districts and parks available (see Table 16-16). Business and commercial locations in Osceola County include a thriving 1,200-acre industrial park at Poinciana and a cutting-edge commercial office development at Celebration. Future development will concentrate around the 12.5-mile Osceola Parkway, which connects the international airport with local attractions and numerous major thoroughfares. Accessible and affordable property is available for development along the parkway. Also, Osceola County includes a world-class exposition center, Osceola Heritage Park, which will further enhance the region's international identity. The various business locations are described in more detail below.

- *Kissimmee:* The City of Kissimmee is the home of several business locations, including the Kissimmee Gateway Airport Industrial Park (170 acres next to the Kissimmee Gateway Airport), the Kissimmee/Commerce Industrial Park (50 acres), and Park Place (35 acres). Historic Downtown Kissimmee is being restored with a focus on retaining and recruiting new businesses and is recently home to a KUA wireless network. Kissimmee is also home to the newly established Enterprise Zone, which provides additional incentives for companies who build and hire employees in the Zone.
- *St. Cloud:* The City of St. Cloud is the location of several business parks, such as the St. Cloud Commerce Center (40 acres), the Osceola Industrial

Park (122 acres) and the Hickory Tree Industrial Park. These sites are located along the U.S. 192 corridor. Additionally, the City is developing the Stevens Plantation, which will offer 99 acres for industrial land uses. This project along with all of St. Cloud is covered by the “Cyber Spot” the citywide high-speed wireless network that is 100% free to all homes and businesses.

- *Celebration*: Celebration is a first-class, architecturally, innovative mixed-use community built by the Walt Disney World Company. Celebration encompasses a sophisticated, upscale corporate office location pre-wired for high-tech applications. The two primary business locations in Celebration are Celebration Place (125 acres) and Celebration Boulevard. Celebration Place is the only location in Osceola County with Class A office space, totaling 166,000 square feet (sq. ft.) in the first phase. In addition to office uses, Celebration Boulevard offers hotel and conference center facilities.
- *U.S. 192 Corridor*: This divided highway connects U.S. 27, Walt Disney World, Interstate 4, S.R. 417, John Young Parkway (S.R. 423), Orange Blossom Trail (U.S. 17-92/U.S. 441), Florida’s Turnpike and Narcoossee Road through Celebration, Kissimmee and St. Cloud. The roadway is the home of numerous tourist commercial uses. A recent landscape and directional sign improvement project has upgraded the image of the boulevard. U.S. 192 continues eastward to the Florida Atlantic Coast.
- *Osceola Parkway*: Osceola Parkway is a new divided toll highway connecting Interstate 4 through northern Osceola County to Boggy Creek Road, just south of Orlando’s International Airport. The Parkway connects to two other major limited access expressways: S.R. 417 (the GreeneWay) and the Florida Turnpike. There are several office/industrial parks located along the corridor.
- Osceola Corporate Center (1,370 acres) is a mixed-use development located on Osceola Parkway, spanning from West of John Young Parkway to the CSX Rail line West of Michigan Ave. Osceola Corporate Center provides a variety of approved land use options, including office, hotel, distribution and retail opportunities. Most recently Osceola Corporate Center is home to The Loop, a robust 440,000 sq. ft. retail center.
- Xentury City (400 acres) is a mixed use office, commercial and resort hotel development which is the home of Gaylord Palms Resort and Convention Center. Xentury is located at the intersection of International Drive and Osceola Parkway and includes property extending South to U.S. 192. It offers excellent access to Orlando International Airport and Kissimmee Gateway Airport, in addition to Interstate 4, U.S. 192, International Drive and other arterial roads. Xentury is approved for 1,250,000 sq. ft. of office, 400 sq. ft. of retail and 6,000 hotel rooms.

- *Poinciana*: The 1200-acre Poinciana Office and Industrial Park is located on Poinciana Boulevard at the intersection with Orange Blossom Trail (U.S. 17-92). The location has rail, air, and road access. Poinciana is a master planned community with 900 acres of light industrial/warehouse sites available, which range in size from 1 to 200 acres. Utilities, including electric, gas, water and sewer, are available.
- *ChampionsGate*: ChampionsGate is a mixed-use development that is located near the I-4 corridor at the Polk County line. Osceola County anticipates that demand for additional commercial/office development will occur on their side of the county line near this development. ChampionsGate is home to the newly constructed Four-Diamond Omni Resort Hotel, which host 730 deluxe rooms and 70,000 square feet of conference facilities.

f. Quality of Life Factors

“Quality of Place” is a concept that ties into economic development. Creating quality places in the County includes adding amenities, offering lifestyle choices and maintaining a pristine environment. Quality places have the extra edge to compete with other communities to attract employers with high-wage jobs, including high-tech industries. Research and experience indicates that a competitive advantage to attract new high-wage jobs and highly educated workers goes to communities with a great quality of life.

Osceola County possesses many positive attributes that contribute to quality of life. The area is rich in history, culture, and diversity and offers many recreation choices. The Central Florida location is ideal from a climatic standpoint. Walt Disney World, Sea World, Universal Studios and other major attractions are just minutes away, as are many large nature preserves, lakes and parks. The County also includes world-class bass fishing and numerous golf courses. The Osceola County Heritage Park is the spring training home to the Houston Astros Major League Baseball team.

Osceola County has a unique culture of its own, born in the ranching traditions and Florida “Cracker” history of the area. The world-famous Silver Spurs Rodeo is held twice a year, in October and February, bringing national rodeo stars to Kissimmee.

g. Transportation and Support Systems

Business and Industry require support systems in order to receive raw materials to create and distribute goods and services. Tourism is especially dependent on a convenient and efficient transportation network.

1) Transportation

Central Florida has a multi-faceted transportation system, including roads, public transit, rail, and airports. The transportation system is discussed in detail in the Transportation Element.

Planned roadway projects in Osceola County for the next 5 years (to 2010) included an additional interchange with the Florida's Turnpike; a widening of U.S. 192 from two to four lanes to Brevard County; the Western Beltway Part C (I-4 to SR 50); the four-laning of SR 60 (Florida's Turnpike to Indian River), CR-15 (Narcoossee Road); the four-laning of Poinciana Blvd., Neptune Rd. and Kissimmee Park Rd.; a Marigold Avenue connection to 17/92 in Polk County (Poinciana Parkway); six-laning Osceola Parkway from Florida's Turnpike to Boggy Creek Rd.; four-laning Boggy Creek Rd. from Hilliard Isle Rd. to E Boggy Creek Rd; six-laning John Young Parkway from Carroll St to the Orange County line; and a corridor study for Hoagland Blvd. From Vine St. to 17/92 (including a four-lane, divided highway).

Orlando International Airport (OIA) is one of the busiest and most modern airports in the nation. The International Air Transport Association rates OIA the #1 airport in North America for overall convenience and ease of making connections for business travelers.

Kissimmee Gateway Airport is becoming the destination of choice for recreational and corporate aviation. Airport facilities include a terminal and many aviation businesses ready to provide service to visiting aircraft. In 2004, two new large hangars, totaling over 26,000 SF were completed, as well as another 90,000 SF of aircraft parking pavement. The FAA has completed the installation of the Instrument Landing System (ILS). An FAA Approach Lighting System, a complement to the ILS, is currently under construction. Their main runway has recently been completely resurfaced and has 500 feet of additional length available for landing aircraft. Total length is 6,000 feet. Several other projects, including two additional large hangars, are in the discussion/planning stages with several airport businesses.

Port facilities serving Osceola County are a short distance away. The shipping and cruise ports of Cape Canaveral, Tampa, Jacksonville, and Miami offer a variety of choices for international shipping.

Rail is easily available through CSX for freight and Amtrak for passenger service. Osceola County marks the connection hub for the state. The rail line bisects Kissimmee and Poinciana. In addition, Kissimmee still uses its historic downtown passenger train station.

LYNX provides public bus transportation to Osceola County. Since 1993, the public transit system in the County has grown from no public transit system at all to having a total of eight routes. The eight LYNX bus routes are 4, 10, 12, 18, 26, 55, 56 and 57. These routes connect the two cities of Kissimmee and St. Cloud and the unincorporated areas in the County, with Walt Disney World and Orlando. The Osceola Square Mall serves as a transfer site.

2. Current Economic Development Programs

a. Osceola County Economic Development Programs

1) Osceola County Economic Development Department

In Osceola County, visionary government and business leaders paved the way for diversification of an economy that has long been rooted in tourism. Osceola County established its economic development program in 2000 as a County department.

The newly created department is the result of all local governmental agencies in the County working together. The department is jointly funded by the City of Kissimmee, the City of St. Cloud, the Osceola County School District, and Osceola County. The aim of the Department is to give Osceola County the necessary edge to raise the median wage for the County's citizens, while promoting existing industry and providing assistance to businesses wishing to expand or locate in Osceola County.

The Economic Development Department has a contract for services with Enterprise Florida and the Metro Orlando Economic Development Commission; coordinates mutually-beneficial activities with the Kissimmee-St. Cloud Convention and Visitor's Bureau, which covers tourism; partners with the chambers of commerce of the Cities of Kissimmee and St. Cloud; and coordinates with the Cities of Kissimmee and St. Cloud. The Department is the conduit through which each of these entities coordinates their efforts to retain and recruit business in Osceola County.

The primary function of the Economic Development Department of Osceola County is to assist in the retention, recruitment and expansion of businesses and industries in Osceola County. The Department's mission statement is *"to create high-wage, value added jobs in targeted business and industries while building and maintaining a balanced economy geared toward the Osceola sense of community."*

The Department provides businesses with information and assistance with site selection, demographics, quality of life, education, and federal, state and local incentives, as well as any other type of information requested by

potential clients. The Department's goal of creating high-wage, value-added jobs is expected to expand the community's tax base and create a greater quality of life for the County's citizens. A diversification of the local economy is the chosen path to reach that goal.

Recently, the Board of County Commissioners approved a policy to allow up to 60% mitigation of transportation impact fees for targeted industries. This is important, because it allows the Department to provide an added incentive for targeted companies who build and own new facilities and expand exiting facilities in Osceola County.

Business Recruitment: The County has identified target industries to attract to Osceola County. These include: plastics manufacturing, wireless technology, pharmaceutical and medical, as well as "back office" (i.e., corporate headquarters, inbound call centers, accounting departments, and various other business operations that are not visible to the public) and operational and shared corporate services. The Economic Development Department's approach to attracting new business is through a very focused and aggressive marketing program based on research.

The Economic Development Department also assists businesses by putting together a team of private and public experts to provide information and services. The Economic Development Department's program is recognized by the state of Florida as a "Primary Contact." Companies that locate or expand into Osceola County may qualify for incentives created and set aside by the Board of County Commissioners and the Cities of Kissimmee and St. Cloud.

The County Economic Development Department has identified appropriate industrial and other commercially zoned land available for development, with or without utilities provided. The Economic Development Department staff matches relocating businesses with these potential sites.

Another Economic Development Department program is the "I-DO" program or "I Develop Osceola." The I-DO concept is directed at bringing together and training County staff and others to be part of the Economic Development Department team. This team then may assist a potential business that is looking to relocate to the County, referred to as a "client."

Business Retention and Expansion: The staff of the Economic Development Department is working to build an atmosphere of cooperation between County government and businesses. One of the programs offered by the Department is the *Existing Industry Ambassador Program*. This program is intended to help retain existing businesses and

to assist in their growth. Business assistance includes identifying employee training and recruitment sources. The Economic Development Department introduces the services offered by the County to the businesses, answers questions and pairs the business with the correct agency, such as the state of Florida “Incumbent Worker” or the “Quick Response” training programs.

Enterprise Zone: The Enterprise Zone program represents a joint venture with the City of Kissimmee and Osceola County Board of County Commissioners. An Enterprise Zone, designated by the State of Florida, is an area targeted for economic revitalization. Financial incentives are offered to business and property owners to encourage private investment and the creation of jobs for the residents in the zone. A 5.0 square mile area of Osceola County has been designated as the Osceola County/City of Kissimmee Enterprise Zone, the area is comprised of approximately 5,118 residents and 422 businesses. Portions of the Enterprise Zone are located within the City of Kissimmee. Tax incentives are offered to all types of businesses that are located within the Enterprise Zone who employ zone residents, rehabilitate real property or purchase business equipment to be used in the zone. Tax credits are available to businesses that pay either the Florida Corporate Income Tax or the Florida Sales and Use Tax. Sales tax refunds and sales tax exemptions are available if eligible purchases are made. Homeowners are also eligible for a sales tax refund for applicable building materials.

2) The Kissimmee Convention and Visitors Bureau

The Kissimmee Convention and Visitors Bureau (CVB) has the primary function of bringing visitors to the County, promoting the tourism industry, and boosting the economy. The CVB is an Osceola County agency, created by state statute and serves as advisors to the Board of County Commissioners on tourism issues and the tourist tax. Osceola County’s Kissimmee CVB has a \$20-million budget and employs 65 people. The KSCCVB keeps tourism industry performance statistics on hotel occupancy and average daily room rates, airport activity, projected lodging inventory growth, average daily visitor population, and the origin of visitors. Since the economic downturn in late 2001, the CVB has focused on creating a more stable tourism market through diversification.

3) The Industrial Development Authority

The Osceola County Industrial Development Authority (IDA) has bonding authority to be used for industrial projects. The IDA obtains an administration fee for any bonds issued. This fee assists the Economic Development Incentive program, which is offered by the County. The IDA has, until recently, been relatively inactive and has not exercised its

authority and potential. Strategies for use of the bonding authority includes building infrastructure to support industry, assisting with the zoning changes to commercial and industrial land, purchasing and packaging land for development, and marketing programs to attract new industry. The IDA is one source of funds for the Economic Development Department incentive program.

b. Other Economic Development Programs

Several government agencies have economic development programs, with most of these programs operated in coordination with the County's programs. These programs are described in this section.

1) City of Kissimmee

The City of Kissimmee has set aside funds to assist targeted economic development projects with relocation or expansion. Impact-fee financing is offered to qualifying projects. These incentive programs are coordinated through the Osceola County Economic Development Department.

The City of Kissimmee has established a Community Redevelopment Agency (CRA) to restore the historic downtown. Kissimmee's CRA was established in 1993 to strengthen the City's historic core. Among the list of the CRA's goals is a focus on economic development, which includes an economic development committee made up of local business people. This group has created a menu of incentives and grants to assist new and existing businesses in the CRA. Some of their current projects include the Water and Sewer Impact Fee Assistance Program, a marketing program for downtown, and a streetscape project on Broadway.

2) The City of St. Cloud

The St. Cloud City Council has adopted a formal incentive ordinance that provides certain infrastructure improvements for targeted projects. Other incentives are possible and generally based on utility usage, the number of jobs that pay 100 percent of Osceola County's average wage, or 40 percent of any Osceola County incentive grant. These incentive programs are coordinated through the Osceola County Economic Development Department. Similar to the City of Kissimmee, the City of St. Cloud has a Main Street program. The St. Cloud Main Street Program has received limited grants from both the City and the County to revitalize the downtown and maintain its vitality for the merchants. It is a not-for-profit agency receiving additional funding primarily from events, fundraisers, sponsors, and membership dues. The Main Street Program supports several economic development committees. The Promotion Committee is

responsible for creating a positive image of the business district to attract customers and investors, and to rekindle community pride.

Another Main Street committee is the Economic Restructuring Committee whose purpose is to strengthen the existing economic assets of the business district while diversifying its economic base. The process begins with two critical steps, undertaken concurrently: (1) compiling a thorough inventory of the district's existing building and businesses; and (2) conducting a market analysis to provide a profile of the area through an examination of demographic statistics, current economic trends, and future projections.

3) The Metro Orlando Economic Development Commission

The Metro Orlando Economic Development Commission (EDC) is an organization that helps businesses within the four-county Metro Orlando region. Local governments, referred to as "community partners," pool resources to represent the region and support the EDC. A not-for-profit, public-private partnership founded in 1977, the EDC serves the City of Orlando, Orange, Seminole, Lake and Osceola Counties. The EDC is consistently recognized as one of the top economic development groups in the world.

4) Enterprise Florida Inc.

The primary economic development resource for building business in Florida is Enterprise Florida Inc.. Enterprise Florida is a partnership between Florida's government and business leaders, targeting several programs for small businesses. Enterprise Florida's mission is to increase economic opportunities for all Floridians, by supporting the creation of quality jobs, a well-trained workforce and globally competitive businesses. Urban job development is one of the focus areas of Enterprise Florida. Enterprise Florida is working to bring business investment and jobs to help economically distressed "inner cities" become economically prosperous. The Targeted Business Development Unit has this goal as its focus. The unit offers assistance and services to local economic development programs to support the growth and vitality of urban centers. A small area in Northwest Osceola County is part of this program. Enterprise Florida has a program to help local governments recruit businesses with high-paying jobs, called "Qualified Target Industry Tax Refund." The Osceola County Economic Development Department is utilizing this program to help raise the median wage rate. Relocating or new businesses of selected target sectors apply to receive tax refunds for each job offering 150 percent or 200 percent of the local average annual wage. Osceola has refined its list of targeted industries to fit the resources, market niches and needs of the community.

The state of Florida offers several incentives to business, including the following:

- No state personal income tax
- No sales tax on food or medicine
- No state-level ad valorem tax
- No inventory tax
- Sales and use tax exemptions for research and development costs
- No sales tax on containers and packaging or on materials incorporated into a final product
- No sales tax on boiler fuels
- Sales tax exemptions for the motion picture, television, and recording industries
- Tax refunds of up to \$5,000 per job created for qualified targeted industries

The state of Florida also has financing incentives. The Industrial Revenue Bond (IRB) has financing authorized for industrial use. The Enterprise Bonds for Industry Program is an independent financing corporation that promotes financing for small manufacturers at attractive rates. Enterprise Florida provides capital for start-ups, expansions, technology transfer and businesses seeking to export goods and services. Florida First Capital Finance Corporation is a non-profit corporation certified to issue Small Business Association debentures (bonds). International transactions in Florida are exempt from documentary stamp tax and international banking transactions are exempt from the intangible tax. Additionally, the Florida Black Business Board provides financing for black-owned businesses.

5) Kissimmee/Osceola County Chamber of Commerce

The Kissimmee/Osceola County Chamber of Commerce is a private membership organization representing businesses in the City of Kissimmee and the County. The Chamber provides a variety of services, such as networking opportunities, trade shows, government relations, promotion and advertising, employee training through the "Quality Initiative" and community services.

Osceola Small Business Development Center: The Kissimmee/Osceola County Chamber of Commerce has a program to assist small businesses and small business start-ups. The Economic Development Department has assisted as a funding source in the past.

6) The St. Cloud Greater Osceola Chamber of Commerce

The St. Cloud Greater Osceola Chamber of Commerce is proud of its role in representing the business community and of being a strong force in preserving the character of our community with major hometown events such as the Fourth of July Lakefront Celebration, the Fall Community Reunion Weekend, the annual Holiday Parade, and Southern Lifestyles Business Expo with its "Taste of St. Cloud" evening. The Candidates' Forum and Politics in the Barn bring political candidates before the electorate in old-fashioned, one-on-one style events. In addition to its work fostering economic development, the Chamber also serves the county as a Visitor's Center, and houses and manages the St. Cloud Historical Museum, presenting and preserving St. Cloud's unique history.

Osceola Small Business Development Center: In cooperation with Osceola County and the Kissimmee Chamber of Commerce, the St. Cloud Greater Osceola Chamber of Commerce has a program to assist small businesses and small business start-ups.

7) The Florida Cattleman's Association

The Florida Cattleman's Association has been dedicated to Florida's cattle industry since 1934. Although a statewide organization, the Kissimmee headquarters location is evidence of the strength of Osceola County's ranching economy and its statewide influence.

C. ANALYSIS

The analysis section of the Economic Development Element identifies opportunities based on the information in the inventory of existing conditions and issues identified. The section also looks at business development opportunities and recommendations for the future.

1. Opportunities for Economic Development

Osceola County has many positive attributes to help develop and improve the local economy. Opportunities include, employability and availability of a relatively young work force; diversity of cultures and languages; a low cost of doing business; a moderately-high standard of living near a tourist area; location and climate; convenience of nearby roadway systems and rail service; wealth of preserved environmentally pristine natural areas; vast areas of cattle ranch lands that offer a rural lifestyle found no where else in Central Florida; the Kissimmee Gateway Airport, which appeals to the more sophisticated executive and business aviation market; and opportunities for joint use of public facilities, such as high school campuses for satellite college educational classes or for community parks and recreation facilities.

2. Business Development Opportunities

a. Land Requirements and Availability for Projected Needs

The current amount of commercial building stock and commercially zoned vacant lands accommodate different needs and provide adequate space for numerous business groups. The amount of available commercial and industrial land is slowly decreasing. Providing an adequate supply of commercial and industrial lands to meet the projected growth demand is a large focus of Osceola County. The County may assist in the delivery of commercial space by providing streamlined permitting services, developing flexible regulations, providing appropriate land use designations and zoning categories, offering a high quality of life, and by proactively providing infrastructure, especially central sanitary sewer service.

b. Infrastructure Requirements

The adequacy of this infrastructure is evaluated in various elements and summarized in the Future Land Use Element. Generally speaking, improvements to the road system, the water and sewer systems, and the drainage systems will be necessary to support future commercial and industrial land development activities. Protection of the environment, residential neighborhoods, rural areas and the unique identity of Osceola County, while building the economy, are essential. The County has several programs that are being planned or are underway to achieve this goal.

c. Economic Incentive Enhancements

The Economic Development Department will continue to seek to attract high-wage, targeted industries. One of the many tools the Economic Development Department uses to attract these industries is the use of federal, local, and state incentives. Incentives may include job creation, capital investment, and other incentives, including fast-track permitting. Individually or collectively, these incentives may be used to present a competitive relocation package. Another tool that was recently added is the Enterprise Zone program. This tool will be used to attract high wage targeted industries as well as neighborhood servicing business to relocate in economically distress areas throughout Osceola County. Another area the Economic Development Department is looking at for the future is a seed money program that would assist small businesses to locate in Osceola County. Another area of interest is the establishment of a small business incubator.

d. Workforce Enhancement

An increasing challenge to Osceola County is the education of the workforce. Osceola County may consider encouraging additional training and professional development facilities such as trade schools, four-year colleges and universities.

e. Quality of Life/Economics of Amenity

Enhancing the quality of life requires higher standards for development; the protection of unique characteristics; landscape enhancements; a quality educational system, amenities; parks; historic districts; and culture will continue to be a primary target for Osceola County. Osceola County has an opportunity to focus its marketing efforts on defining its unique qualities.

Osceola County, the City of Kissimmee and the City of St. Cloud have many opportunities to create a rich palette of amenities for residents and visitors to enjoy. Creating quality places in the County includes amenities, lifestyle choices and a pristine environment.

One of the important parts of creating a quality place is an outdoor recreation package. Such activities may include walking, running, biking, horseback riding, canoeing, rowing, sailing, climbing, and rollerblading. Cultural and historic resources also lend to an amenity package that reinforces an area's particular identity. The creation of bike trails, nature preserves, upgraded parks, walking tours of historic districts, designated scenic drives, improved public lake access, educational and library services, and enhancing arts and cultural opportunities all contribute to an amenity package.

The County is considering the development of design standards to ensure compatible, high-quality development, to encourage excellence in design, and to encourage Crime Prevention Through Environmental Design (CPTED) principles in order to increase the safety of commercial developments. More detailed information regarding CPTED is included in the Urban Design Element.

f. Sustainable Development

As the County continues to plan out its future, urban sprawl and the cost of delivering services to sprawl development patterns will strongly be discouraged throughout other elements within the Comprehensive Plan. Sustainable development, an innovative planning concept found throughout the Comprehensive Plan, includes building a sustainable economy. One of the key indicators of a sustainable community is a strong economy.

g. Tourism Development

Osceola County continues to work to expand the tourism focus and diversify the existing tourism promotion efforts to include ecotourism and cultural tourism, business tourism, and sports.

h. Targeted Growth Sectors

Osceola County will continue to market targeted growth sectors including apparel; business services; chemical and allied products; communications; corporate headquarters; high-tech electronics; fabricated metal products; furniture; industrial machinery; motion picture sound, recording and reproduction studios; research and development; wholesale distribution; security and commodity brokers; and non-depository credit institutions.

D. CONCLUSION

The Osceola County Economic Development Department serves as the primary economic development agency for the County and serves Kissimmee, St. Cloud, Poinciana, Celebration, and all other communities of Osceola County. The mission of the Department is to continue to strengthen, retain, and expand existing business and industries, and to ensure that Osceola County is the preferred location for new or relocating businesses and industries. While business retention and expansion are extremely important, business recruitment in Osceola County has a significant level of importance. Business recruitment does not occur at the expense of, or as an alternative to existing business development. Rather, it is a compliment that benefits the existing business. As Osceola County continues to plan its future, the County must understand the importance of building a viable and strong economic base that may withstand inevitable fluctuations in today's market economy.

Table 16 - 1: 2004 Osceola County Employment Distribution by Industry

Employment Distribution by Industry	
Agriculture, Forestry, Fishing and Hunting	0.66%
Manufacturing	2.58%
Construction	8.71%
Transportation, Warehousing and Utilities	0.51%
Wholesale Trade	3.62%
Retail Trade	16.04%
Finance, Insurance, Real Estate	5.55%
Services	44.38%
Government (Local, State and Federal)	16.38%
Other	0.59%

Source: State of Florida, Agency for Workforce Innovation, 2005

Table 16 - 2: Population Trends of Osceola County

Year	Population
2005	235,156
2010	304,400
2015	372,900
2020	446,800
2025	525,100

Source: University of Florida, Bureau of Economic and Business Research, 2005

Table 16 - 3: Business Start-ups in Osceola County

	2000	2001	2002	2003	2004
Osceola County	3,332	3,989	4,624	5,281	7,071

Source: Market Force Corporation, 2004

Table 16 - 4: Major Private Employers in Osceola County

Private Employer	Number of Employees
Gaylord Palms Resort and Convention Center	1,733
Lowe's Regional Distribution Center	969
McLane/Suneast, Inc.	980
Florida Hospital/Kissimmee	794
Florida Hospital Celebration Health	710
Tupperware Corporation	600
Osceola Regional Medical Center	522
Mercury Marine	400
Valencia Community College	369
Kissimmee Good Samaritan Village	361
PepsiCo	100

Source: Osceola County Economic Development Department, 2005

Table 16 - 5: Major Public Sector Employers

Major Government Employers	Number of Employees
Osceola County Public Schools	5,021
Osceola County Government	1,577
City of Kissimmee Government	630
City of St. Cloud Government	521

Source: Osceola County Economic Development Department, 2005

Table 16 - 6: Osceola County 2004 Average Wage Rates

	Average Annual Wage	Average Hourly Wage
Osceola County	\$27,954	\$13.44

Source: State of Florida Agency for Workforce Innovation, 2005

Table 16 - 7: Median Household Income

	2000	2005	2010	% Change, 2005-2010
Osceola County	\$38,425	\$41,872	\$46,936	12.1%
Orlando-Kissimmee MSA	\$42,116	\$45,656	\$50,614	10.9%
Florida	\$38,924	\$42,642	\$47,823	12.1%
United States	\$42,257	\$46,338	\$51,813	11.8%

Source: www.DemographicsNow.com, SRC, LLC, 2005

Table 16 - 8: Osceola County 2004 Retail Price Index

ITEM	COST OF LIVING INDEX
Food	99.36
Medical Care	99.52
Housing	86.94
Other Goods and Services	99.10
Transportation	96.52
TOTAL	94.07

Source: Bureau of Economic and Business Research, 2005

Table 16 - 9: Osceola County Historical Price Level Index

YEAR	PRICE LEVEL INDEX
1998	96.56
1999	95.52
2000	95.81
2001	96.36
2002	96.09
2003	98.45
2004	98.83

Source: Bureau of Economic and Business Research, 2005

Table 16 - 10: Osceola County Property Tax Rates and Millage Breakdown

Sales Tax	7%
State Sales Tax	6 %
County Infrastructure Tax	1 %
Millage Rates Breakdown	
County Millage Rate	6.7445
General Fund	5.9945
Library District	0.5000
Save Osceola	0.2500
EMS Millage Rate	0.6542
School Millage Rate	8.3670
Required Local Effort (RLE)	5.3690
Discretionary	0.7600
Capital	2.0000
Debt Service	0.2380
SFWMD Millage Rate	0.6970
District	0.2840
Okeechobee Basin	0.3130
Everglades Construction	0.1000
Total of all Millage Rates (City/MSTU millage rates may apply)	16.4627

Source: Osceola County Property Appraiser, 2005

Table 16 - 11: Osceola County Historical Unemployment Rates

Year	Unemployment Rate
1994	5.8%
1995	4.7%
1996	3.8%
1997	3.7%
1998	3.1%
1999	2.7%
2000	2.8%
2001	4.5%
2002	5.7%
2003	5.2%
2004	4.8%

Source: Florida Agency for Workforce Innovation, 2005

Table 16 - 12: 2005 Osceola County Population by Age

Age	Osceola Population	Percent
0-14	48,800	21.5%
15-24	33,198	14.7%
25-34	32,601	14.4%
35-44	34,218	15.1%
45-54	30,422	13.4%
55-64	21,764	9.6%
Over 65	25,764	11.4%
Median Age	34.6	

Source: www.DemographicsNow.com, SRC, LLC, 2005

Table 16 - 13: 2005 Osceola County Population Estimates by Ethnicity & Gender

Race, Ethnicity and Gender	Osceola Population	Percent
White	177,058	78.1%
Black	16,145	7.1%
Asian	5,394	2.4%
American Indian or Alaska Native	955	0.4%
Other	27,235	12.0%
People of other races	19,288	
People of 2 or more races	7,947	
Hispanic (of any race)	83,078	36.6%
All Races	226,787	100 %
Male	112,919	49.8%
Female	113,868	50.2%
Total	226,787	100 %

Source: www.DemographicsNow.com, SRC, LLC, 2005

Table 16 - 14: Osceola County Education Profile

Highest Education Level Completed	Osceola County
Grade K-8	9,516 (6.6%)
Grade 9-12	23,186 (16.0%)
High School Graduate	47,303 (32.7%)
Some College, No Degree	29,831 (20.6%)
Associates Degree	10,526 (7.3%)
Bachelor's Degree	16,956 (11.7%)
Graduate Degree	7,471 (5.2%)
Total Number of Adults (25+)	120,300

Source: www.DemographicsNow.com, SRC, LLC, 2005

Table 16 - 15: Osceola County Education Summary

Total Number of Schools (K – 12)	Number
Number of Elementary Schools (K – 5)	19
Number of Middle (6 – 8)	7
Number of High Schools (9 – 12)	7
Number of Charter Schools	11
Alternative Schools	3
Alternative Program Sites	10
Total Number of Schools	57
Total Enrollment (August 2005)	49,290
Graduation Rate percent	66.6%
Dropout Rate percent	3.9%
Number of Teachers (Classroom)	2,521
Number of Professional Staff	2,500
Average Number of Years Teaching Experience	10.01
Average Starting Teacher Salary	\$30,600
Student/Teacher Ratio (Average)	1:19.6
Daily Expenditures Per Pupil	\$34.00
2004 FCAT Scores	
Elementary Schools, Grade 4	
Reading	308
Math	296
Writing	3.4
Middle Schools, Grade 8	
Reading	286
Math	299
Writing	3.6
High Schools, Grade 10	
Reading	286
Math	313
Writing	3.6

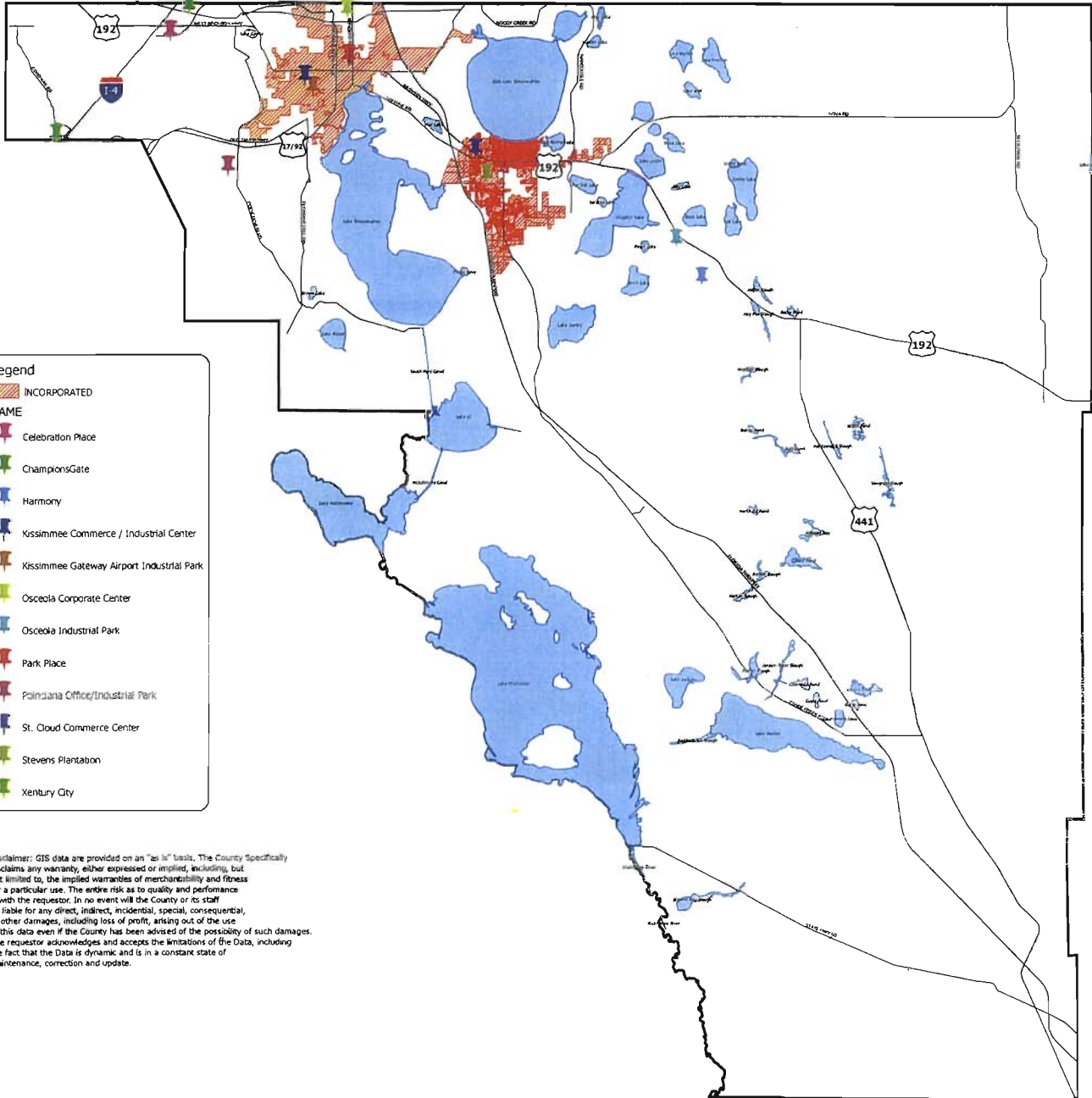
Source: School District of Osceola County, Florida, 2005

Table 16 - 16: Osceola County Office and Industrial Parks

Park and Location	Utilities Available	Acres	Major Highway Access
Osceola Corporate Center U.S. 441/Osceola Parkway	Kissimmee Utility Authority; Toho Water Authority; Peoples Gas	1,370	Florida's Turnpike, Osceola Pkwy. SR 528, U.S. 192, U.S. 441
Poinciana Office/Industrial Park U.S. 17-92/Poinciana Blvd.	Progress Energy; Poinciana Utilities- Water/Sewer; Peoples Gas; Rail	1,200	U.S. 192, U.S. 17-92, I-4
Xentury City Osceola Pkwy / International Drive	Progress Energy, Toho Water Authority	400	Interstate 4, S.R. 417, Osceola Parkway
Kissimmee Gateway Airport Industrial Park U.S. 192/Hoagland Blvd.	Toho Water Authority; Peoples Gas; Kissimmee Utility Authority; Adjacent to Kissimmee Gateway Airport	170	I-4, U.S. 192, U.S. 17-92. Osceola Parkway
Celebration Place I-4/U.S. 192	Progress Energy; Toho Water Authority	125	I-4, U.S. 192, S.R. 417
Osceola Industrial Park U.S. 192/Hickory Tree Road	City of St. Cloud-Electric/Water/Sewer	122	U.S. 192, Florida's Turnpike
Corporate Campus @ Stevens Plantation C.R. 523 / W New Nolte Road	St. Cloud Utilities-Electric; City of St. Cloud-Water/Sewer	102	New Florida Turnpike Exit in 2006, U.S. 192
ChampionsGate	Toho Water Authority, Progress Energy, Central Florida Gas	55	Interstate 4, U.S. 17/92
Kissimmee Commerce/Industrial Center U.S. 192/Dyer Blvd.	Kissimmee Utility Authority-Electric; Toho Water Authority; Peoples Gas; Rail	50	I-4, Florida's Turnpike, U.S. 192, U.S. 441, U.S. 17-92
St. Cloud Commerce Center U.S. 192/Kissimmee Park Road	St. Cloud Utilities-Electric; City of St. Cloud-Water/Sewer	40	Florida's Turnpike, U.S. 192
Park Place North U.S. 441/Park Place Blvd.	Kissimmee Utility Authority-Electric; City of Toho Water Authority; Peoples Gas	35	U.S. 441

Source: Osceola County Economic Development Department, 2005

Industrial / Office Park



Legend

INCORPORATED

NAME

- Celebration Place
- ChampionsGate
- Harmony
- Kissimmee Commerce / Industrial Center
- Kissimmee Gateway Airport Industrial Park
- Osceola Corporate Center
- Osceola Industrial Park
- Park Place
- Polinziana Office/Industrial Park
- St. Cloud Commerce Center
- Stevens Plantation
- Xentury City

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