



COASTAL BEND ECONOMIC DEVELOPMENT DISTRICT

Comprehensive Economic Development Strategy

2026

2031



COASTAL BEND
COUNCIL OF GOVERNMENTS

78

U.S. ECONOMIC DEVELOPMENT ADMINISTRATION

PREPARED FOR



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Message from the CEDS Committee Chair

"Regional planning and collaboration is vital for achieving sustainable, resilient, and equitable growth."

A Council of Governments (COG) plays a central role in regional economic planning, particularly when it also serves as the federally designated Economic Development District (EDD) for its service area. The Coastal Bend Council of Governments (CBCOG) provides the platform for multi-jurisdictional collaboration on issues that no single city or county can address alone, including economic growth, infrastructure, workforce, and resilience. In Texas, COGs are explicitly tasked with regional development planning and coordination, helping communities plan for future growth, improve efficiency, and address shared challenges across counties. As an EDD, CBCOG leads the regionally driven economic development planning process recognized by the U.S. Economic Development Administration - bringing together public, private, and nonprofit stakeholders to craft the Comprehensive Economic Development Strategy (CEDS), the region's blueprint for long-term prosperity and resilience. This EDD function ensures that the region's priorities are aligned, competitive for federal funding, and grounded in a collaborative vision that strengthens economic opportunity across the entire multi-county region.

The Aransas County Partnership recognizes the vital role regional planning and collaboration is for achieving sustainable, resilient, and equitable economic growth. Our planning emphasizes the importance of aligning local priorities with regional goals, particularly in areas such as workforce development, infrastructure investment, broadband expansion, transportation connectivity, and coastal resilience. CBCOG's ongoing regional planning framework provides the structure necessary for this alignment. Their expertise in data analysis, grant coordination, intergovernmental collaboration, and long-range planning ensures that communities like ours are not working in isolation, but within a shared vision that strengthens the entire Coastal Bend.

CBCOG's leadership in economic development planning is especially evident in its ability to bring together diverse stakeholders - local governments, economic development organizations, industry partners, workforce agencies, and community groups—to address complex, multi-jurisdictional challenges. Whether guiding regional hazard mitigation efforts, supporting broadband and infrastructure initiatives, or coordinating transportation and workforce strategies, CBCOG serves as the connective tissue that links local efforts to regional and state-level opportunities.

It has been my privilege to serve as the Chair of the CEDS committee to guide the creation of this plan. I look forward to continuing the momentum created through our shared planning efforts.



A Message from the Executive Director

“It is with great pride and optimism that I present the 2026–2031 CEDS for the Coastal Bend region.”

It is with great pride and optimism that I present the 2026–2031 Comprehensive Economic Development Strategy (CEDS) for the Coastal Bend region. This document is the result of extensive collaboration among local governments, economic development organizations, educational institutions, and community stakeholders who share a commitment to building a resilient and prosperous future for our eleven-county region.

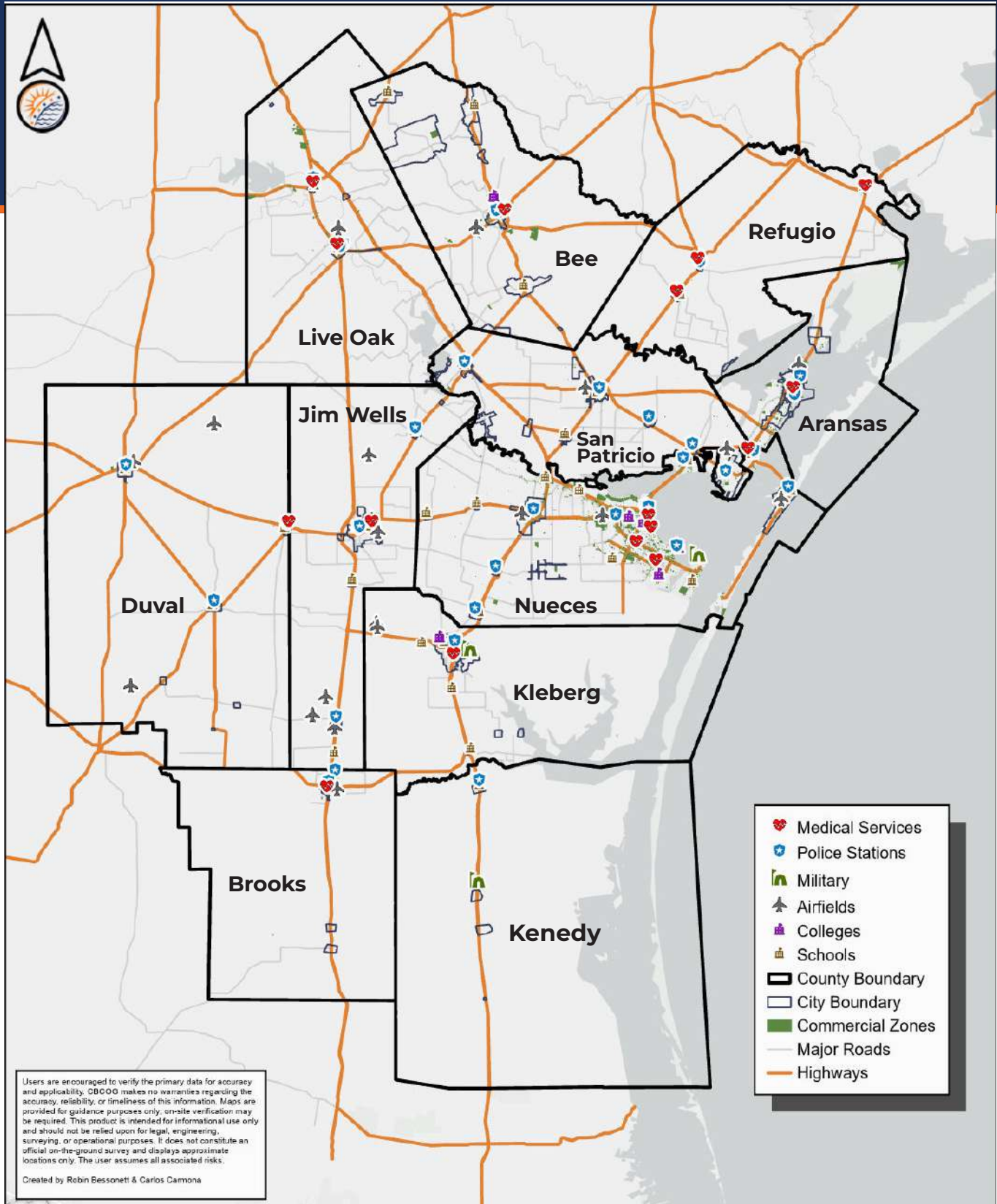
Over the past several years, the Coastal Bend has demonstrated extraordinary momentum. We’ve seen historic investments in energy, manufacturing, and infrastructure, including the launch of the Gulf Coast Growth Ventures facility, the expansion of the Port of Corpus Christi, and the development of one of the nation’s leading carbon capture hubs in Kleberg County. These projects are not only transforming our economy—they are creating thousands of jobs and positioning our region as a national leader in innovation and sustainability.

We’ve also made significant strides in workforce development, rural infrastructure, and community resilience. Through strategic partnerships and targeted grant funding, we’ve expanded access to training, improved water and wastewater systems, and strengthened emergency preparedness across the region. Our communities are thriving with new festivals, cultural events, and public spaces that celebrate the unique identity of the Coastal Bend.

The CEDS is both a roadmap and a reflection of our shared values—resilience, equity, innovation, and collaboration. I want to thank our Board of Directors, regional partners, and the dedicated staff at CBCOG for their leadership and vision. Together, we are shaping a future that honors our past and embraces the opportunities ahead.



Coastal Bend Economic Region



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Created by Robin Bessonett & Carlos Camona

Data sources: Esri, TomTom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), U.S. Department of Transportation (BTS NTAD, 2025). Esri U.S. Federal Datasets (2025). CBCOG

Executive Summary

The Texas Coastal Bend comprises an 11-county region situated along the bountiful Gulf of Mexico where diverse assets and opportunities for economic prosperity abound, yet a variety of natural and man-made risks threaten local to regional resilience.

This 2026 Comprehensive Economic Development Strategy (CEDs) for the Coastal Bend was carefully crafted to address those risks while strengthening regional collaboration and partnerships to advance common economic resilience goals. The 2026 CEDs builds on previous versions with updated economic statistics and analyses, while considering significant growth and challenges the region faced over the past 5 years. Both past challenges and those yet to come require a paradigm shift toward economic resilience and prosperity that centers on community well-being while fostering growth. This CEDs aligns with the state’s 2025–2029 economic strategy—prioritizing Business & Industry, Innovation, Workforce, and Infrastructure. (Office of the Governor, *Bigger. Better. Texas.*, 2025)

Using a Strengths, Weaknesses, Opportunities and Threats analysis, the CEDs highlights key themes around which goals, objectives and strategic actions will be advanced, including. Importantly, in each theme, the cross-cutting theme of regional partnerships is carefully woven throughout. It is only because of our partnerships and collaborations that we can address regional challenges, rebound from disasters and make gains toward economic resilience.

Key among these is the CEDs Committee, a diverse group of members from across the region representing varied interests, from economic development to municipal planning, academic resilience analysis, non-profit community issues and more. In finalizing the CEDs, the Committee included key collaborative groups, including the Regional Resilience Partnership formed by the Coastal Bend Council

of Governments and Texas A&M University Corpus Christi following Hurricane Harvey, as well as key individual organizations such as Workforce, Port industries and community organizations.

The CEDs further looks to its partners at state and federal levels to inform its actions and help strengthen its collaborations, including by incorporating key datasets and processes such as the Texas General Land Office’s Economic Development Strategy and Diversification Study and the U.S. Economic Development Administration’s evolving work and guidance on economic resilience. This is critical, as the CEDs Committee and Council of Governments do not have direct mission authority to address many of the actions contained herein, but will rely on partnerships and people to share capacity, data and information, strengthen regional assets and build resilience.

This Strategy is intended to guide regional collaborations and priorities over the next 5 years. Progress will be annually evaluated using performance metrics to ensure actions are being implemented while obstacles are identified and addressed. We invite all regional stakeholders to join us in advancing this vision for economic resilience and community well-being, which will make the Coastal Bend an even more remarkable place to work, live, raise our children and prosper.



NOTABLE ACCOMPLISHMENTS

COASTAL BEND COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY 2026 – 2031

Notable accomplishments in the Coastal Bend since the 2021 CEDS

\$32B+

Capital investment attracted since 2021

4200+

New jobs created across the region

\$135M

Texas GLO grants for infrastructure

9

Major industrial expansions

Infrastructure & Capital Investments

- Port of Corpus Christi continued its expansion as the #1 U.S. crude oil export port.
- ExxonMobil/SABIC Plastics Plant completed a \$10 billion investment in San Patricio County.
- Steel Dynamics Steel Mill launched operations with a \$1.9 billion investment.
- Cheniere LNG Facility expanded with a \$20 billion investment.
- Corpus Christi International Airport received upgrades to support increased commercial traffic.
- City of Gregory received \$2.5 million for water infrastructure improvements through the American Rescue Plan.
- Kleberg County received \$1.4 Million for the construction of a 14.5-acre industrial park and transportation hub.
- Texas General Land Office awarded \$135 million in grants for wastewater, flood mitigation, and emergency infrastructure.



ExxonMobil



CHENIERE

New Facilities & Buildings

- Corpus Christi Army Depot expanded operations.
- Kleberg County opened the Economic Development and Emergency Operations Center, funded by EDA
- Leisure and Entertainment District in Portland is under development.
- Real, Inc held groundbreaking for new Regional Transportation Headquarters in Jim Wells County. Building projected to come online in 2026.
- Craft Training Center of the Coastal Bend added new workforce training capacity.



New Festivals & Events

- Corpus Christi Pride Parade & Block Party
- Surftoberfest – Corpus Christi
- Taste of Aransas Pass
- Ingleside Renaissance Fair
- Sinton Fiddlers Fest
- Coastal Comida Fest – Corpus Christi
- Nuestra Señora de San Juan de los Lagos Jamaica Festival – Corpus Christi
- Ranch Hand Weekend Festival – Kingsville
- Corpus Christi Food Truck Festival
- Shoreline Food Truck Festival – Monthly

New Companies & Major Expansions

- ExxonMobil/SABIC Gulf Coast Growth Ventures – \$10 billion investment, 600+ jobs.
- Steel Dynamics, Inc. – \$1.9 billion steel mill, 800+ jobs.
- Turner Industries Group – Expanded operations in Corpus Christi, 1,500 employees.
- MMR Constructors – New facility, 1,200 employees.
- Flint Hills Resources – Refinery upgrades, 1,100 employees.
- Kiewit Offshore Services – Yard expansion, nearly 1,000 employees.
- Southwest Business Co. – New regional office, 800 employees.
- Bay Ltd. – Expanded industrial services, 1,700 employees.
- South Texas Direct Air Capture (DAC) Hub – King Ranch developed by Occidental Petroleum and 1PointFive.
- Leased 106,000 subsurface acres for carbon capture and sequestration.
- Expected to remove up to 30 million metric tons of CO₂ annually.
- Estimated storage capacity of 3 billion metric tons of CO₂.
- Up to \$1.2 billion in federal funding from the U.S. Department of Energy.
- One of two national DAC hubs selected for federal support.
- Estimated 2,000–2,500 new jobs in Kleberg County.
- Partnership with Texas A&M University–Kingsville for workforce certifications.
- Supports carbon removal credits for aviation and cement industries.



ECONOMIC CONDITIONS & REGIONAL PROFILE

COASTAL BEND COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY 2026 – 2031

Economic Conditions & Regional Profile

\$98B

Total Regional Output

586K

Residents, 2024

\$44B

Regional GDP

349K

Jobs, 2024

OVERVIEW

A unique blend of industrial strength, coastal access, and diverse regional assets across 11 counties—one of Texas' most petroleum-manufacturing-intensive economies.

The Coastal Bend economy is defined by a unique blend of industrial strength, coastal access, and diverse regional assets across its 11 counties. With 586,102 residents and 348,901 jobs in 2024, the region remains one of Texas' most petroleum-manufacturing-intensive economies, supported by major refinery, petrochemical, and energy-related operations concentrated around Corpus Christi and San Patricio County. Total economic output reached \$98.08 billion, with manufacturing alone generating 40.3% of all output, followed by significant contributions from real estate, construction, oil and gas extraction, and health care. These industries form the backbone of a high-productivity, export-oriented industrial base closely tied to the Port of Corpus Christi and global energy supply chains.

Despite this concentration, the region's GDP composition and employment structure are more diversified than its output profile suggests. Service-oriented sectors such as administrative government, health care, retail, accommodation and food services, and professional services play a major role in sustaining the workforce and supporting

community needs. Manufacturing, while dominant in output, represents only 3.44% of total employment, underscoring the sector's capital-intensive nature. The region aligns strongly with Texas' strategic industry clusters—including energy, advanced manufacturing, logistics and distribution, and aerospace/defense—while also supporting growth opportunities in biotechnology, life sciences, and corporate services.

Urban and rural areas contribute differently but complementarily to the regional economy. Urban counties—Nueces, San Patricio, and Aransas—account for over 85% of regional output and GDP, driven by capital-intensive manufacturing, logistics, trade, and health care. Rural counties, by contrast, play a crucial upstream role through agriculture, energy extraction, and public-sector services, and maintain more balanced economic compositions. Rural employment leans heavily on agriculture, mining, and local services, while urban employment is dominated by health care, government, retail, hospitality, and construction. Together, these dynamics create an integrated

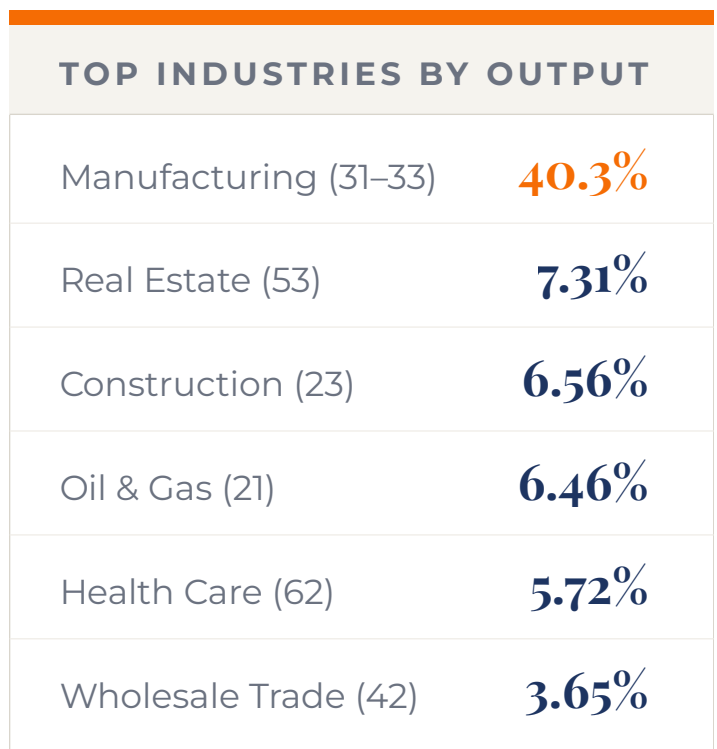
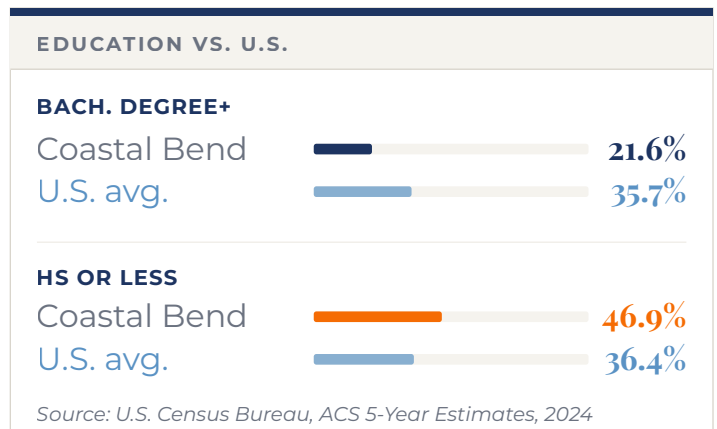
economic system where urban industrial activity relies on rural land, labor, and resource inputs—reinforcing the Coastal Bend’s regional interdependence and long-term competitiveness.

Demographics and Labor Force

The Coastal Bend’s educational attainment profile shows a workforce with comparatively lower levels of postsecondary completion and a higher concentration at the lower end of the attainment spectrum. Only 21.6% of adults hold a bachelor’s degree or higher, far below the national level of 35.7%, while 46.9% have a high school diploma or less, compared to 36.4% nationally. This disparity is driven by both a larger “less than high school” population (15.4% vs. 10.4% U.S.) and a higher share of high-school-only graduates (31.5% vs. 26.0%), signaling a strong need for foundational skill-building, adult education, and secondary credential completion. At the same time, the region’s elevated share of individuals with “some college, no degree” (22.9% vs. 19.1% U.S.) indicates a substantial pool of near-completers, who could complete credentials with targeted re-engagement strategies, flexible scheduling, and credit-for-prior-learning opportunities. While associate degree attainment aligns with national trends (8.6% vs. 8.8%), both bachelor’s (14.4%) and graduate/professional attainment (7.2%) trail the U.S., limiting access to high-wage, high-growth occupations.

Labor force participation is also shaped by regional commuting patterns, which reveal a highly car-dependent workforce. In the Coastal Bend, 79.9% of workers drive alone, compared to 68.8% nationally, while carpooling (10.1% vs. 8.5%) is slightly higher, but public transit use remains extremely low (0.8% vs. 3.2%), as do walking rates (1.6% vs. 2.4%). The most notable gap is in remote work: only 6.2% of local workers work from home, far below the national rate of 15.1%. While occupational composition plays a role, this disparity also reflects broadband access, reliability, and affordability constraints, which limit employers’ willingness to offer hybrid or remote roles and restrict workers’ ability to access them.

These combined education and mobility patterns have clear implications for economic strategy. Lower attainment levels contribute to skill gaps in high-demand fields, while transportation dependence increases household costs and constrains access to jobs, training, and services—particularly for low-income residents, older adults, and households without reliable vehicles. At the same time, the region has significant opportunities: expanding broadband can unlock remote and hybrid work, improving access to training and higher-wage employment; scaling vanpool and employer-sponsored ride-sharing can build on existing carpooling trends; and targeted investment in first/last-mile connections, safer walking/biking routes, and



demand-responsive transit can improve access to key job centers. Aligning workforce pathways with employer needs, while expanding mobility and digital access, will strengthen the Coastal Bend’s labor force, raise productivity, and improve long-term economic resilience.

Transportation in the Coastal Bend Region

Transportation in the Coastal Bend region is shaped by its mix of urban, small urban, and rural communities spanning 11 counties. With Corpus Christi serving as the regional economic anchor—concentrating employment, higher education, healthcare, port activity, and workforce training—reliable mobility is essential for ensuring access to jobs and critical services. Many residents regularly

cross county lines for work, medical care, and daily needs, making regional connectivity a foundational component of economic participation and quality of life.

The transportation network is provided by a diverse ecosystem that includes public transit agencies, human service and nonprofit providers, municipal programs, private operators, and volunteer based services. Offerings range from fixed route transit and ADA paratransit to demand response services, microtransit, vanpools, and intercity bus connections. However, service levels vary widely across the region, with rural counties facing the most substantial gaps due to limited hours, small fleets, and eligibility restrictions. These constraints create significant barriers for shift based workers, residents seeking access to workforce training centers and colleges, and individuals requiring reliable medical or dialysis transportation.

Transportation challenges disproportionately affect seniors, people with disabilities, low income households, veterans, and zero vehicle families—populations already at elevated risk of transportation insecurity. Employers consistently cite mobility barriers as a key constraint on job access, worker reliability, and staffing stability. Addressing weaknesses such as insufficient cross county service, limited after hours and weekend transit, and inadequate accessible transportation is essential to strengthening labor force participation, improving access to healthcare and training, and supporting both rural and aging populations. A more coordinated and equitable transportation system will enhance regional resilience and help communities fully participate in economic growth across the Coastal Bend.

Broadband and Digital Access

Broadband access is increasingly essential to the Coastal Bend’s economic competitiveness, workforce mobility, education, healthcare delivery, and overall quality of life. Although 92% of households have access to high-speed broadband (HSBB), more than 60,000 households remain unserved, predominantly in rural and suburban areas, limiting access to remote work, online learning, and telehealth services. These gaps place the region—part of Texas’





broader South Region that includes Corpus Christi, Laredo, and McAllen—at a structural disadvantage as digital connectivity becomes more critical to long-term economic development.

A major challenge is the region’s extremely limited fiber-to-the-home (FTTH) deployment. Only 19% of households are served by fiber, the second-lowest rate in Texas, leaving roughly 620,000 households without high-capacity broadband infrastructure required for modern business operations, emerging industries, and advanced healthcare services such as telemedicine. Affordability and competition further constrain adoption: 46% of households earn less than \$50,000, and 66% of households are served by only one internet service provider, the highest single-provider dependence in the state. This lack of competition leads to higher prices and reduced service quality, especially outside the Corpus Christi metropolitan area.

Digital inclusion barriers compound these infrastructure and affordability challenges. Seventeen percent of households lack any computing device, and 43% rely solely on

smartphones, severely limiting participation in remote work, online education, and digital healthcare. Digital literacy needs are significant, particularly among adults without a high school diploma (30%) and older residents (13% over age 65), reinforcing inequities in technology access and workforce readiness. Broadband limitations also affect schools, healthcare providers, and emergency communications, especially in rural communities that lack reliable home connectivity. As a result, the Coastal Bend is designated a high-need, high-vulnerability region for broadband investment in the Texas Broadband Plan, underscoring the importance of prioritizing fiber expansion, affordability programs, device access, and digital skills training in the CEDS.

Coastal Bend Water & Environmental Profile

The Coastal Bend relies on a combination of surface water, groundwater, and limited reuse to meet municipal, industrial, agricultural, and environmental needs. The region’s primary water sources—the Corpus Christi Regional Water



Supply System (Choke Canyon Reservoir, Lake Corpus Christi, Lake Texana, and the Mary Rhodes Pipeline Phase II) and the Gulf Coast and Carrizo aquifers—support both urban centers and rural communities. Six wholesale water providers now serve the region: the City of Corpus Christi, San Patricio Municipal Water District, South Texas Water Authority, Nueces County WCID #3, Nueces River Authority, and the Port of Corpus Christi Authority, reflecting an evolving system that increasingly considers seawater desalination to support long-term industrial growth.

Water demand is projected to increase from 253,218 acre-feet in 2020 to 276,492 acre-feet by 2070, with nine of eleven counties facing shortages under drought-of-record conditions. Regional deficits are driven by source-water limitations and treatment constraints, particularly at the O.N. Stevens Water Treatment Plant. To close these gaps, the Region N Water Plan recommends a diversified portfolio of conservation, expanded reuse, aquifer storage and recovery (ASR), groundwater development, and both brackish and seawater desalination—a mix intended to build resilience

against rising demand, drought, and climate stressors.

Water quality challenges add to these supply pressures. Surface waters across the region face recurring issues such as nutrient loading, chlorophyll-a, bacteria, low dissolved oxygen, salinity fluctuations, and elevated TDS, with impairments documented in Choke Canyon Reservoir, Lake Corpus Christi, and coastal bays including Aransas, Oso, and Nueces. Groundwater concerns include saltwater intrusion, arsenic and uranium presence, and subsidence risks in portions of the Gulf Coast Aquifer. Natural resource sectors—agriculture, fishing, and estuarine ecosystems—depend on adequate freshwater inflows but are increasingly stressed by declining groundwater levels, energy-sector demands, contamination risks, and worsening drought conditions, such as the 2007–2015 drought of record. Strengthening resilience will require continued investment in water storage, diversified supplies, drought planning, and emergency interconnects to protect communities, industries, and ecosystems across the Coastal Bend.



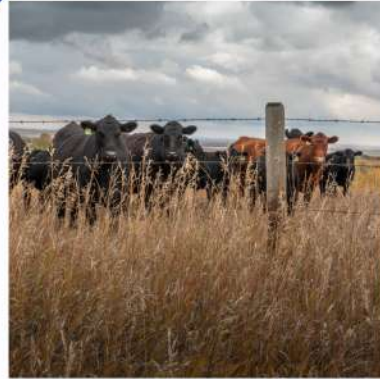
Housing and Cost of Living

The Coastal Bend region faces substantial housing affordability pressures, driven by high cost burdens among renters, limited affordable units, and an aging housing stock—especially in rural communities. These challenges mirror statewide trends documented in the Texas Consolidated Plan, which identifies severe shortages of affordable housing for low-income renters across non-metro areas. Housing cost burden, defined as spending more than 30% of income on housing, is particularly acute for households earning 0–30% of AMI, a group heavily represented in Corpus Christi and surrounding rural counties. Lower regional median incomes mean that housing, utilities, and insurance consume a larger share of household budgets, with seniors, people with disabilities, and service-sector workers experiencing disproportionate hardship.

Local housing conditions intensify these affordability challenges. The region lacks sufficient affordable rental units near job centers and coastal communities, while many rural single-family homes require significant rehabilitation. This aligns with statewide findings that older and rural housing stock requires greater investment and is more likely to be substandard. Special needs populations—including elderly individuals, people with disabilities, and residents of unincorporated areas—face higher rates of inadequate

housing and fewer accessible units. Housing instability and homelessness also persist, with minority and extremely low-income residents experiencing higher rates of unsheltered homelessness. Outside Corpus Christi, the availability of emergency shelters, transitional housing, and supportive services remains limited, producing acute regional disparities in access to critical resources.

Rural areas of the Coastal Bend experience conditions similar to colonias, including inadequate housing quality, limited infrastructure, and severe affordability constraints, especially where basic water, wastewater, and transportation connectivity are lacking. Combined with lower wages common in the region's service- and tourism-based industries, rising insurance and utility costs, and the scarcity of affordable rental options, households face elevated cost-of-living pressures despite relatively low nominal housing prices. The 2025–2029 State Consolidated Plan underscores that housing affordability is the region's most pressing challenge, especially for extremely low-income renters, seniors, and people with disabilities. These factors directly affect workforce stability, economic mobility, and resilience—reinforcing the need for targeted investment in housing production, rehabilitation, and supportive services within the CEDS framework.



REGIONAL ECONOMIC DRIVERS

COASTAL BEND COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY 2026 – 2031



REGIONAL ECONOMIC POWERHOUSE

The Port of Corpus Christi

The Port of Corpus Christi on the Texas Gulf Coast is a major economic driver, facilitating trade, supporting industries, and fostering growth.



PORT CORPUS CHRISTI®

Strategic Location

Located on the Gulf of Mexico, the port offers direct access to global shipping routes and connects seamlessly to U.S. highways and rail networks.

Cargo Handling

Renowned for handling diverse commodities—crude oil, petroleum, agriculture, and more—its facilities efficiently manage large cargo volumes.

Energy Hub

A key player in crude oil and LNG exports, the port hosts refineries and petrochemical plants, boosting the local economy.

Economic Impact

Generating thousands of jobs, the port significantly contributes to the region's GDP and supports diverse industries.

Environmental Initiatives

Committed to sustainability, the port engages in eco-friendly practices and community projects, enhancing its reputation and community relations.

Future Growth

With ongoing infrastructure improvements, the port is set for growth, strengthening its role as a regional economic asset.

In brief, the Port of Corpus Christi is vital for its strategic location, cargo handling, and energy sector contributions, driving economic growth on the Texas Gulf Coast.

ECONOMIC DRIVERS

Naval Air Stations Corpus Christi and Kingsville

Naval Air Station Corpus Christi and Naval Air Station Kingsville are pivotal military installations in the Coastal Bend, contributing significantly to the region's economy and development.



Naval Air Station Corpus Christi

Training Hub

Naval Air Station Corpus Christi serves as a premier training facility for naval aviators. It is home to Training Air Wing FOUR, which trains pilots from the U.S. Navy, Marine Corps, Coast Guard, and several allied nations. This training activity fuels local economic growth through employment and operational expenditures.

Employment Opportunities

The base provides numerous civilian and military jobs, supporting the local economy. The presence of personnel and their families creates a demand for housing, services, and amenities, boosting local businesses.

Community Engagement

NAS Corpus Christi maintains strong community ties, participating in local events and initiatives. This engagement fosters a positive relationship with the surrounding community and attracts further investment and development.



Naval Air Station Kingsville

Advanced Training

NAS Kingsville specializes in advanced jet training, playing a critical role in preparing the next generation of naval aviators. Its operations bring significant financial contributions to the area through contracts and local spending.

Strategic Importance

The base's strategic location supports national defense objectives, increasing federal investment in infrastructure and technology. This investment enhances local economic stability and growth.

Economic Multiplier Effect

The base's activities have a multiplier effect on the regional economy, creating additional jobs in sectors such as retail, healthcare, and education. The influx of personnel contributes to demand for local goods and services, further invigorating the regional economy.

COASTAL BEND COLLEGE

THE KEY TO PROSPERITY

Higher Education

The Coastal Bend region is home to four accredited institutions, as well as the Craft Training Center and several apprenticeship programs.

Universities

Texas A&M University Corpus Christi, Texas A&M Kingsville both offer Bachelors, Masters and Doctoral degrees.

Technical Education

The Craft Training Center trains NCCER level skills in Welding, Pipefitting, Instrumentation, Plumbing and others.

Credentials

Institutions are credentialed by SACSCOC (Southern Association of Colleges and Schools Commission on Colleges; NCCER (National Center for Construction Education and Research) and others.

Community Colleges

Coastal Bend College and Del Mar College take the lead on providing career ready certifications and degree programs.

Registered Apprenticeships

The Coastal Bend has both Merit Shop and Union Apprenticeship programs in electrical, plumbing, masonry and others.

Nimble

Each institution works closely with Industry and Workforce to quickly create content to get employees trained in the right skills.

Higher education in the Coastal Bend works together to provide the education and skills employers need to be productive.





SHOVEL READY ASSETS

Economic Potential in Each County

The Coastal Bend Region contains numerous potential sites for economic development that are prepared for immediate utilization.

Aransas County

Aransas Pass / Rockport SH-35 Industrial Corridor

- Multiple cleared, zoned industrial tracts with utilities along SH-35 and Loop 1781
- Appropriate for light manufacturing, marine supply (non-port), and resilience-related industry

Bee County

Chase Field Industrial Airport Complex (Beeville)

- ~1,800+ acres, active industrial airport, utilities in place
- One of South Texas' most established shovel-ready redevelopment sites

Brooks County

Falfurrias – US-281 Industrial / Logistics Node

- Highway-front industrial parcels with utilities available
- Strong fit for food systems, logistics, and border-adjacent support uses

Duval County

Freer / Benavides Industrial Sites (Hwy 44 / Hwy 16)

- Cleared, fenced industrial parcels with heavy-vehicle access
- Scalable sites suitable for small-to-mid industrial users

Jim Wells County

Alice Industrial Corridor – US-281 / SH-44

- Cluster of industrial-zoned tracts with utilities and highway access
- Functions as an aggregated shovel-ready corridor rather than a single pad site

Kenedy County

Kenedy / Sarita Energy-Industrial Sites

- Large-footprint industrial land and campuses, utilities available
- Ideal for energy transition manufacturing and heavy industrial uses

Kleberg County

Kingsville Industrial Park / Hwy 77 Corridor

- Industrial land supported by active county infrastructure investment
- Manufacturing, ag-processing, and logistics-ready (non-higher-ed land)

Live Oak County

Three Rivers Industrial / Logistics Area (IH-37 / US-281)

- Prime crossroads location between San Antonio, Corpus Christi, and the Valley
- Near-term shovel-ready for logistics, manufacturing, and distribution

Nueces County

Calallen / Robstown Industrial Sites (Non-Port)

- CCREDC-vetted sites with utilities, rail, and highway access
- Tier-1 shovel-ready inventory anchoring the region

Refugio County

Refugio Transload Terminal Expansion Area

- ~100+ acres available adjacent to active rail transload facility
- One of the strongest non-port logistics opportunities in the rural Coastal Bend

San Patricio County

Gingrich Industrial Site (Sinton Area)

- ~572 acres, CCREDC Qualified Site with completed due diligence
- Capable of supporting large-scale manufacturing or phased development



RESILIENCE & RECOVERY

COASTAL BEND COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY 2026 – 2031



Resilience and Recovery

The Coastal Bend's robust framework of regional partnerships, coordinated preparedness planning, and targeted infrastructure investment is building lasting resilience across all eleven counties. We strengthen our communities' ability to withstand, recover from, and adapt to the full range of natural hazards that define life on the Texas Gulf Coast.

Disaster Risks and Critical Vulnerabilities

The Coastal Bend faces a multi-hazard hurricane environment characterized by simultaneous risks of storm surge, destructive winds, inland flooding, and tornadoes. While strong winds often capture the most public attention, the National Weather Service emphasizes that flooding remains the deadliest hazard, as torrential rainfall can overwhelm drainage systems, rivers, and transportation corridors across the region. Storm surge, even from offshore tracks, can devastate low-lying coastal areas, damaging homes and infrastructure, while tornadoes embedded in outer rainbands can cause additional destruction far from a storm's center. As highlighted in the 2025 NWS Hurricane Guide, preparedness efforts must address all hazards, not just wind impacts.

The region's coastal geography heightens vulnerability, particularly on barrier islands and in bayside communities where minimal elevation and extensive shoreline

development increase the consequences of surge and wave action. Even without direct landfall, elevated tides and battering surf can inundate neighborhoods, compromise utilities, and contaminate water systems—conditions that demand close monitoring of local surge maps and evacuation orders. Inland, torrential rainbands frequently trigger flash flooding and prolonged river flooding, especially in areas with limited drainage capacity or saturated soils. Flooded roads, underpasses, and low-water crossings quickly become hazardous and can severely restrict emergency response

Vulnerabilities intensify for at-risk populations and essential infrastructure. Mobile and manufactured homes, older structures, and buildings lacking modern wind or flood protections face disproportionately high damage during storms. Residents without personal transportation, medically dependent individuals, and those requiring powered medical equipment encounter barriers to safe evacuation and continuity of care. The NWS urges early enrollment in the State of Texas Emergency Assistance Registry (STEAR) to



support evacuation needs. Meanwhile, disruptions to electricity, water/wastewater systems, fuel supply chains, and communications networks may persist for days or weeks, complicating both emergency operations and economic recovery. Effective preparedness requires relying on official NWS and National Hurricane Center products, maintaining go-kits, reviewing evacuation routes, and securing insurance and documentation well before hurricane season. The NWS Corpus Christi Hurricane Guide consolidates surge maps, safety checklists, and storm updates to help translate risk information into life-saving action.

Climate and Coastal Resilience

Regional resilience framework and priorities.

Following Hurricane Harvey, the Coastal Bend established the Regional Resilience Partnership (RRP)—administered by CBCOG and the Harte Research Institute (TAMU-CC)—to move communities from disaster recovery to holistic resilience across all 11 counties. The RRP Strategic Plan (2022–2032) outlines a ten-year, capacity-building agenda: scientific and technical assistance, hyper-local risk identification, training, funding strategies, and project implementation support (a “living” plan with periodic updates). Collectively, these actions are designed to strengthen the people–infrastructure–ecosystem nexus and institutionalize regional collaboration for flood, surge, and wind hazards as well as chronic stressors. [harteresearch.org], [coastalbendcog.org]

Coastal and flood risk reduction—nature, gray, and governance.

RRP’s approach pairs governance capacity (regional coordination, grant support, and technical guidance) with scalable flood and surge solutions—from wastewater regionalization and watershed restoration to data-driven mapping of flood hazards and social vulnerability that informs high-impact mitigation investments (e.g., CDBG-MIT allocations). External partners (e.g., American Flood Coalition) reinforce the model’s emphasis on understanding current and future risk, prioritizing the most vulnerable neighborhoods, and leveraging inter-jurisdictional coordination, which is especially critical in rural areas with limited staff and resources. In parallel, the Region N Water Plan advances drought and supply resilience (conservation, reuse/ASR, and brackish/seawater desalination) to protect coastal inflows and economic stability—an essential complement to coastal flood and surge strategies. [coastalbendcog.org], [floodcoalition.org], [twdb.texas.gov]

Critical assets, lifelines, and implementation pathways.

Regional transportation and utility lifelines remain focal points for resilience implementation, with the Corpus Christi MPO developing a criticality framework to prioritize assets for PROTECT-eligible hardening and nature-based defenses. CBCOG’s preparedness work (THIRA/SPR, interoperable communications, mutual aid) and RRP’s training and technical assistance together establish repeatable pathways to plan, fund, and deliver projects that reduce losses and speed recovery. The combined framework—RRP Strategic



Plan (capacity and governance), MPO resilience planning (asset prioritization), and Region N water strategies (supply reliability)—provides a coordinated roadmap to strengthen coastal and climate resilience while aligning with state and federal funding opportunities.

Economic Diversification and Supply Chain

The Coastal Bend’s economy is high-output and capital-intensive, anchored by refining, petrochemicals, chemicals, and related logistics—clusters that deliver outsized value-added but relatively modest direct employment shares. That industrial core confers global competitiveness yet concentrates risk in commodity cycles, trade shocks, and hurricane-related disruptions that can simultaneously affect refineries, ports, and energy corridors. The Texas statewide strategy calls for strengthening Business & Industry, Innovation & Entrepreneurship, Workforce, and Infrastructure, explicitly encouraging regions to broaden sector portfolios while reinforcing core capabilities—an approach that maps cleanly to the Coastal Bend’s opportunity to retain its energy edge while accelerating growth in adjacent and emerging sectors (advanced manufacturing, blue economy/mariculture, logistics tech, data & AI-enabled services, life sciences) and deepening local supply chains.

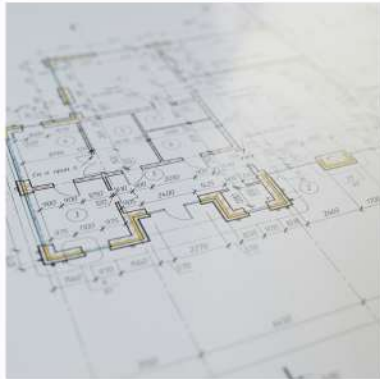
Diversification cannot be separated from water, broadband, and resilience. Region N’s water plan anticipates long-run supply gaps and prescribes conservation, reuse/ASR, and desalination to underwrite growth in both industrial and population-serving sectors; those utilities are prerequisites for siting advanced manufacturing, agri-processing, and data-rich service operations. At the same time, broadband fiber scarcity and high single-provider dependence in the South Region remain adoption and affordability bottlenecks that undercut the region’s ability to land data-intensive employers and convert residents into a digitally productive workforce—issues flagged in the state’s Broadband Plan and directly relevant to expanding tech-enabled clusters.

Finally, diversification must be resilience-positive. The Regional Resilience Partnership (RRP) Strategic Plan (2022–2032) sets a capacity-building agenda (governance, technical assistance, hyper-local risk identification, training, and funding strategy) to reduce flood/surge losses and accelerate recovery—conditions investors increasingly scrutinize. The American Flood Coalition’s case study with the Coastal Bend underscores the competitive value of regional collaboration and social-vulnerability-aware prioritization for flood mitigation; these features improve business continuity, shorten downtime, and protect labor markets—concrete benefits that make the region more investable.

Regional Swot Analysis

A strategic assessment identifying the region's competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths</p> <p>• Strategic Location <i>Proximity to San Antonio, Houston, and the Port of Corpus Christi.</i></p> <hr/> <p>• Industrial Base <i>Strong presence in petrochemical, steel production, and emerging carbon capture projects.</i></p> <hr/> <p>• Educational Assets <i>Multiple universities and community colleges supporting workforce development.</i></p> <hr/> <p>• Natural Resources & Eco-Tourism <i>Coastal access, birding, mariculture, and nature-based tourism.</i></p> <hr/> <p>• Community Engagement <i>Active civic organizations and interest in regional collaboration.</i></p>	<p>! Weaknesses</p> <p>• Water Infrastructure <i>Aging systems, limited access in rural areas, and high costs for expansion.</i></p> <hr/> <p>• Workforce Gaps <i>Shortages in skilled trades, healthcare, and technical fields; lack of training for youth.</i></p> <hr/> <p>• Rural Disparities <i>Shrinking populations, limited commercial space, and poor connectivity in rural counties.</i></p> <hr/> <p>• Siloed Planning <i>Fragmented coordination between counties and cities; lack of unified regional strategy.</i></p> <hr/> <p>• Quality of Life Gaps <i>Limited amenities, public transit, and affordable housing in many areas.</i></p>
<p>↑ Opportunities</p> <p>• Emerging Industries <i>Growth in AI, data mining, pharmaceuticals, and clean energy.</i></p> <hr/> <p>• Regional Marketing & Supplier Development <i>Potential to attract investment through coordinated campaigns.</i></p> <hr/> <p>• Infrastructure Investment <i>Rail, broadband, and water systems to support growth and resilience.</i></p> <hr/> <p>• Entrepreneurship & Small Business Support <i>Incubators, mentorship, and access to capital.</i></p> <hr/> <p>• Youth Engagement <i>Programs to retain talent and prepare students for local employment.</i></p>	<p>⚠ Threats</p> <p>• Climate & Water Security <i>Drought, extreme weather, and water scarcity threaten sustainability.</i></p> <hr/> <p>• Economic Disruption <i>Overreliance on a few industries; lack of diversification.</i></p> <hr/> <p>• Cybersecurity & Infrastructure Decay <i>Vulnerabilities in digital and physical systems.</i></p> <hr/> <p>• Border-Related Crime <i>Human trafficking and narcotics impacting safety and stability.</i></p> <hr/> <p>• Insurance & Housing Market Instability <i>Rising costs and poor building practices in some areas.</i></p>



GOALS, OBJECTIVES & ACTION PLANS

COASTAL BEND COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY 2026 – 2031

Goal 1

Sustainable Infrastructure

Sustainable infrastructure is needed because more frequent extreme weather events and increasing insurance costs demand resilient systems that can reduce losses and maintain essential services. It strengthens long-term economic, social, and environmental stability by prioritizing future-ready infrastructure to remain competitive and adaptable in a changing world.

REGIONAL FOCUS

Water/wastewater expansion, drainage, roads, broadband, resilience, clean energy, and long-term infrastructure sustainability.

Objective 1.1 — Expand and modernize essential infrastructure systems especially in rural and underserved areas.

STRATEGIC ACTIONS

- Conduct comprehensive infrastructure assessments to identify critical gaps and priority upgrades.
- Secure funding for system upgrades and expansions, especially for rural and underserved communities.
- Coordinate with state and local governments to prioritize improvements to roads, drainage systems, and utility networks.

Objective 1.2 — Improve regional broadband access and connectivity.

STRATEGIC ACTIONS

- Develop comprehensive broadband plans to ensure interconnectivity and coverage, particularly in rural areas.
- Pursue funding opportunities to expand broadband infrastructure and close regional digital divides.

Objective 1.3 — Strengthen regional resilience to climate impacts and disasters.

STRATEGIC ACTIONS

- Develop localized disaster preparedness strategies for individual communities.
- Collaborate with regional partners to advance climate resilience planning and mitigation initiatives.



Objective 1.4 — Promote long-term sustainable and future-ready infrastructure development.

STRATEGIC ACTIONS:

- Support infrastructure projects that enhance long-term sustainability, such as desalination, rail connectivity, and clean energy systems.
- Integrate sustainable practices into regional planning and infrastructure decision-making.

Measuring Progress

Number of Assessments Completed; Investment dollars secured for infrastructure improvements; Number of communities with updated disaster preparedness plans; Number of infrastructure projects completed (e.g., drainage, roads, broadband)

Action Partners

Local Governments & Public Works Departments; Coastal Bend Council of Governments; Nueces River Authority; Texas Water Development Board; Texas Department of Transportation; Corpus Christi MPO; Texas Broadband Development Office; Port of Corpus Christi;

Goal 2

Workforce Prosperity

Workforce prosperity is a strong goal for the Coastal Bend because a skilled, stable, and well supported workforce is the foundation of regional economic growth and industry competitiveness. When residents have access to training, good jobs, housing, and transportation, businesses are better able to expand and attract new investment. Prioritizing workforce prosperity ensures long term opportunity for local families while strengthening the region’s overall economic resilience and quality of life.

REGIONAL FOCUS

Technical training, industry-aligned pathways, retention strategies, training for emerging sectors – Artificial Intelligence, pharmaceuticals, lower carbon energy.

Objective 2.1 — Strengthen technical and vocational training aligned with regional industry needs.

STRATEGIC ACTIONS:

- Expand dual credit and certification programs in high demand fields such as welding, refinery technology, and healthcare.
- Maintain and grow partnerships between industry and education providers to align training with current and future workforce demands.

Objective 2.2 — Build coordinated career pathways for youth and non college bound students.

STRATEGIC ACTIONS:

- Expand structured collaborations between industries, school districts, community colleges, and workforce boards.
- Increase work based learning opportunities such as internships, apprenticeships, and job shadowing programs.



Objective 2.3 — Improve workforce retention through housing, transportation, and quality of life investment.

STRATEGIC ACTIONS:

- Develop housing and transit solutions that reduce barriers to employment and support long term workforce stability.
- Support community improvement initiatives that enhance overall livability and attract talent.

Objective 2.4 — Enhance community appeal for attracting and retaining relocating employees.

STRATEGIC ACTIONS:

- Invest in local amenities, recreation, and public spaces that improve residents’ daily experience.
- Promote a welcoming community culture through partnerships with chambers, employers, and civic groups.

Objective 2.5 — Expand training access in emerging and future focused industries.

STRATEGIC ACTIONS:

- Partner with technology firms, universities, and colleges to offer training in artificial intelligence, biotechnology, pharmaceuticals, and lower carbon energy fields.
- Support development of innovation oriented programs that prepare workers for evolving economic opportunities.

Measuring Progress

Number of individuals completing technical/vocational training programs; Employment rates among 18–34-year-olds; Number of certifications or credentials earned in priority sectors

Action Partners

Local Governments; Independent School Districts; Coastal Bend College; Del Mar College; Texas A&M University Corpus Christi, Texas A&M University Kingsville; Craft Training Center; Workforce Solutions of the Coastal Bend; Employment to Education Partners; Economic Development Corporations

Goal 3

Resilient Economic Growth

Resilient economic growth is a strong goal for the Coastal Bend because it helps the region withstand shocks—from hurricanes to industry fluctuations—while maintaining stable jobs and investment. By diversifying the economy and strengthening local capacity, the region becomes less vulnerable to downturns and better positioned for long term prosperity. This approach ensures communities can adapt, recover quickly, and continue thriving even as conditions change.

REGIONAL FOCUS

Capital access, entrepreneurship, community-led development, diversification, rural business support, addressing housing/medical access, and regional collaboration.

Objective 3.1: Improve access to capital and support small business growth, especially in rural areas.

STRATEGIC ACTIONS

- Establish a Logistics Tech Sandbox in a rural community to stimulate entrepreneurship and innovation.
- Conduct sector specific feasibility studies to guide investment and identify high impact opportunities.

Objective 3.2: Strengthen community led economic development and local capacity.

STRATEGIC ACTIONS

- Support community driven initiatives that build local leadership and foster place based development.
- Develop a regional housing strategy to improve affordability and ensure the availability of workforce housing.

Objective 3.3: Foster innovation through stronger partnerships with universities and technology organizations.

STRATEGIC ACTIONS

- Create a Blue Economy & Mariculture Hub, including hatchery expansion, contractor certifications, cold chain improvements, and joint R&D with universities.
- Collaborate with research institutions and tech partners to accelerate innovation across emerging sectors.



Objective 3.4: Diversify the regional economy into future focused sectors.

STRATEGIC ACTIONS

- Conduct feasibility studies for industries such as carbon capture, agribusiness, data mining, and clean manufacturing.
- Support targeted entrepreneurial and workforce initiatives that open pathways into high growth industries.

Objective 3.5: Address structural barriers that limit economic opportunity.

STRATEGIC ACTIONS

- Expand telehealth and mobile clinics to improve access to medical care in underserved communities.
- Integrate transportation, housing, and healthcare strategies to reduce barriers to employment and business growth.

Measuring Progress

Number of patents filed; Number of feasibility studies completed; Regional housing strategy published;
Number of Plans developed

Action Partners

Local Governments; Coastal Bend College; Del Mar College; Texas A&M University Corpus Christi, Texas A&M University Kingsville; Workforce Solutions of the Coastal Bend; Economic Development Corporations; Small Business Development Center; Regional Housing Authorities; Regional Transit Agencies; Hospital Systems

Goal 4

Vibrant Communities

Vibrant communities are essential for the Coastal Bend because they attract and retain residents, talent, and businesses by offering a high quality of life rooted in culture, recreation, and local identity. Strong downtowns, thriving public spaces, and connected neighborhoods also stimulate local economies and support small businesses. By fostering welcoming, dynamic places, the region builds long-term resilience and ensures that both current and future generations can flourish.

REGIONAL FOCUS

Cross county cooperation, rural inclusion, alignment with state priorities, tracking success metrics, strengthening cultural assets, housing affordability, environmental stewardship, and public health.

Objective 4.1 — Strengthen cross county communication and coordinated regional planning.

STRATEGIC ACTIONS

- Host quarterly stakeholder meetings to review progress and adjust strategies, rotating host counties to ensure regionwide participation.
- Hold quarterly cross county convenings to promote coordination and shared problem solving.

Objective 4.2: — Ensure rural communities are fully represented and have equitable access to funding and projects.

STRATEGIC ACTIONS

- Develop a rural engagement strategy to ensure inclusive participation in regional planning processes.
- Support rural jurisdictions in accessing state and federal funding opportunities through technical assistance and collaborative grant development.



Objective 4.3 — Align regional goals with local strategic plans and state/federal priorities.

STRATEGIC ACTIONS

- Conduct regular policy reviews to ensure the CEDS remains aligned with local comprehensive plans, state strategies, and federal funding priorities.
- Publish an annual investor showcase aligned to target sectors to reinforce strategic alignment and attract partners.

Objective 4.4 — Use data driven metrics to measure economic performance and guide decision making.

STRATEGIC ACTIONS

- Implement and maintain a regional performance dashboard tracking job creation, business growth, infrastructure investment, and population trends.
- Publish the regional performance dashboard annually to ensure transparency and encourage accountability.

Objective 4.5: Strengthen downtowns, waterfronts, cultural assets, and community well being.

STRATEGIC ACTIONS

- Advance strategies that support housing affordability, environmental stewardship, and public health as foundational elements of regional economic competitiveness.
- Promote redevelopment and placemaking initiatives that enhance downtowns, waterfronts, and cultural districts.

Measuring Progress

Rural engagement strategy published; Number of policy review meetings; Performance dashboard published; Number of quarterly stakeholder meetings

Action Partners

Local Governments; Texas Department of Agriculture; Economic Development Administration; Other State & Federal agencies; Coastal Bend College; Del Mar College; Texas A&M University Corpus Christi, Texas A&M University Kingsville; Workforce Solutions of the Coastal Bend; Economic Development Corporations;

Goal 5

Healthy Environment

A healthy environment is essential for the Coastal Bend because clean air, water, and resilient natural systems directly support the region's fishing, tourism, and outdoor-recreation economies. Protecting ecosystems like bays, estuaries, wetlands, and coastal habitats also strengthens community resilience against storms, flooding, and climate impacts. By prioritizing environmental health, the region ensures long-term economic stability and improves quality of life for residents and future generations.

REGIONAL FOCUS

Air/water quality, climate resilience, natural resources, environmental health, and community well-being.

Objective 5.1: Improve air and water quality across the region.

STRATEGIC ACTIONS

- Implement regional water quality monitoring stations in bays, estuaries, and inland waterways in coordination with universities and river authorities.
- Expand air quality sensor networks in population centers and industrial corridors to track PM2.5, ozone, and VOCs.

Objective 5.2: Strengthen coastal and climate resilience.

STRATEGIC ACTIONS:

- Support municipal stormwater upgrades, including green infrastructure such as bioswales, permeable pavements, and wetland buffers.
- Add 100 acres of green infrastructure and track PM2.5 and ozone reductions at new sensor locations.



Objective 5.3: Protect and enhance natural resources and ecosystem services.

STRATEGIC ACTIONS:

- Reduce non point source pollution through agricultural best management practice (BMP) incentive programs.
- Strengthen water conservation initiatives, including leak detection, water loss auditing, and drought resistant landscaping.

Objective 5.4: Reduce environmental health risks and improve community well being.

STRATEGIC ACTIONS:

- Reduce municipal water loss by 15% based on AWWA audit standards.
- Expand conservation and environmental health initiatives that improve air quality, water quality, and overall public health outcomes.

Measuring Progress

Number of water quality monitoring sites installed regionwide; Percentage change in key water quality indicators (e.g., bacteria counts, nitrogen/phosphorus loads); Annual reductions in PM2.5 and ozone levels at monitored sites; Number of stormwater retrofit projects completed; Gallons of water saved annually through conservation initiatives

Action Partners

Local Governments; Harte Research Institute; The Blucher Institute; Texas Department of Agriculture; Other State & Federal agencies; Texas Water Development Board; Air Quality Partnership; Coastal Bend College; Del Mar College; Texas A&M University Corpus Christi, Texas A&M University Kingsville



EVALUATION & ACCOUNTABILITY

COASTAL BEND COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY 2026 – 2031

Evaluation Framework

CBCOG tracks progress across all five goal areas through annual reporting, a public-facing regional performance dashboard, and a full five-year CEDS update — ensuring regional investments remain transparent, measurable, and accountable to all stakeholders.

Performance Measures and Baselines

Effective implementation of the CEDS requires clear, measurable performance indicators and reliable baseline data to assess progress over time. Performance measures should track outcomes across the plan’s major goal areas—workforce readiness, infrastructure and resilience, business expansion and diversification, housing and quality of life, and regional collaboration. These indicators help quantify how well the region is advancing economic resilience, closing equity gaps, and supporting high-value industry growth. Establishing baselines using the most recent available data provides an objective starting point from which year-to-year performance can be compared, ensuring that progress is transparent and actionable for partners.

Baseline metrics typically include labor force participation, educational attainment, and job creation, as well as sector diversity, small-business growth, broadband access, water supply capacity, transportation mobility, and housing affordability. Many of these data points derive from authoritative regional planning sources—such as the Region N

Water Plan, which establishes long-term water-supply baselines and projected shortages for the Coastal Bend, and the Texas Broadband Plan, which provides baseline measures for high-speed coverage, provider competition, and digital adoption in the South Texas region. These baselines ensure that future investments—whether in infrastructure, workforce, or economic diversification—are evaluated against consistent reference points..

Annual Reporting and Dashboards

Annual reporting is a core component of the CEDS implementation process, ensuring that regional partners have a clear, consistent view of progress toward the plan’s goals. Each year, CBCOG—working with economic development organizations, local governments, workforce agencies, water and transportation partners, and higher education institutions—will compile updated data on key performance indicators such as job creation, business growth, workforce credential attainment, broadband expansion, water-supply improvements, housing production, and resilience investments. This annual report provides a

Five-Year Implementation Cycle



transparent assessment of what has been accomplished, where gaps remain, and which strategies or projects need adjustment to stay aligned with regional priorities and changing conditions.

A regional performance dashboard will complement the annual report by offering a real-time, user-friendly platform where stakeholders can access updated metrics throughout the year. Dashboards allow decision-makers to track trends at a glance—such as labor force changes, infrastructure upgrades, or progress on resilience and mitigation projects—and support evidence-based planning across jurisdictions. The dashboard also reinforces accountability by making key indicators publicly accessible, helping communities understand how regional investments translate into measurable outcomes.

Together, annual reporting and dashboards strengthen coordination across partners by creating a continuous feedback loop. As data improve and new initiatives launch, the dashboard and annual reports will evolve, incorporating additional metrics tied to economic diversification, supply-chain resilience, water security, and digital inclusion. This approach ensures that the Coastal Bend maintains a shared, data-driven strategy for long-term economic growth and resilience.

Five-Year Update Process

The Comprehensive Economic Development Strategy (CEDS) undergoes a full update every five years to ensure it reflects current economic conditions, emerging

opportunities, and evolving regional challenges. This update begins with a broad data refresh—including new demographic, workforce, industry, infrastructure, broadband, and resilience indicators—paired with a review of major regional plans such as the Region N Water Plan, transportation plans, local comprehensive plans, and the Regional Resilience Partnership Strategic Plan (2022–2032), which emphasizes continuous reassessment of risks, mitigation priorities, and community needs.

The update process includes extensive stakeholder engagement, bringing together economic development organizations, local governments, industry partners, higher education institutions, workforce boards, environmental organizations, and community groups. These partners evaluate progress on existing goals, identify new or emerging economic sectors, reassess vulnerabilities, and revise strategies to ensure alignment with federal EDA guidelines and regional priorities. Input from businesses and residents ensures the updated CEDS addresses on the ground needs and supports equitable economic participation.

The final phase focuses on revising goals, strategies, and the project pipeline to reflect updated conditions and stakeholder priorities. The five year update also realigns performance measures and baselines to ensure continuity with new data and reporting frameworks. Once adopted by CBCOG and regional partners, the updated CEDS becomes the guiding blueprint for regional investment, funding applications, and coordinated economic development efforts for the next five year cycle.



APPENDICES

COASTAL BEND COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY 2026 – 2031

COASTAL BEND ECONOMIC DEVELOPMENT DISTRICT

Comprehensive Economic Development Strategy Committee

NAME	ORGANIZATION	INDUSTRY	AREA OF REPRESENTATION
Jeff Sjostrom	Aransas County Partnership EDC	Economic Development	Aransas County
Randy Seitz	Bee Area Partnership	ED/Tourism	Bee
Commissioner Aaron Trevino	Brooks County	Government	Brooks
Mayor Sally Ann Lichtenberg	City of San Diego	Government	Duval County
Ann Awalt	CACOST	Community Services	Rural Coastal Bend
Judge Charles Burns	Kenedy County	Government	Kenedy
Francis Garcia	Kleberg County	Government	Kleberg & Kingsville
Glynis Strausse	ConocoPhillips	Industry	Live Oak
Dan Korus	Del Mar College	Higher Education	Corpus Christi
Michelle Unda	CCREDC	Economic Development	Nueces
Lenny Anzualdua	RCCCD	Economic Development	Refugio
Jeff West	TAMUK	Higher Education	Coastal Bend
Craig Casper	CCMPO	Transportation	Corpus Christi
Dr. Kiersten Stanzel	CBBE	Environmental	Coastal Bend
Bob Paulison	CBIP	Industry	Corpus Christi
Jeff Pollack	POCC	Port	Coastal Bend
Travis Pruski	N-RA	Water	Regional
Alba Silvas	WFSCB	Workforce Development	Multi-Locations
Jodi Carr	Ingleside EDC	Economic Development	San Patricio
Adam Gawarecki	San Patricio County EDC	Economic Development	San Patricio
Dr. Michelle Lane	Coastal Bend College	Education	Regional
Arturo Marquez	City of Corpus Christi	Economic Development	Corpus Christi
Dr. Deniz Gevrek	TAMUCC	Higher Education	Corpus Christi
Dr. Diana DelAngel	HRI		Corpus Christi



Committee Partners, Roles and Collaborations

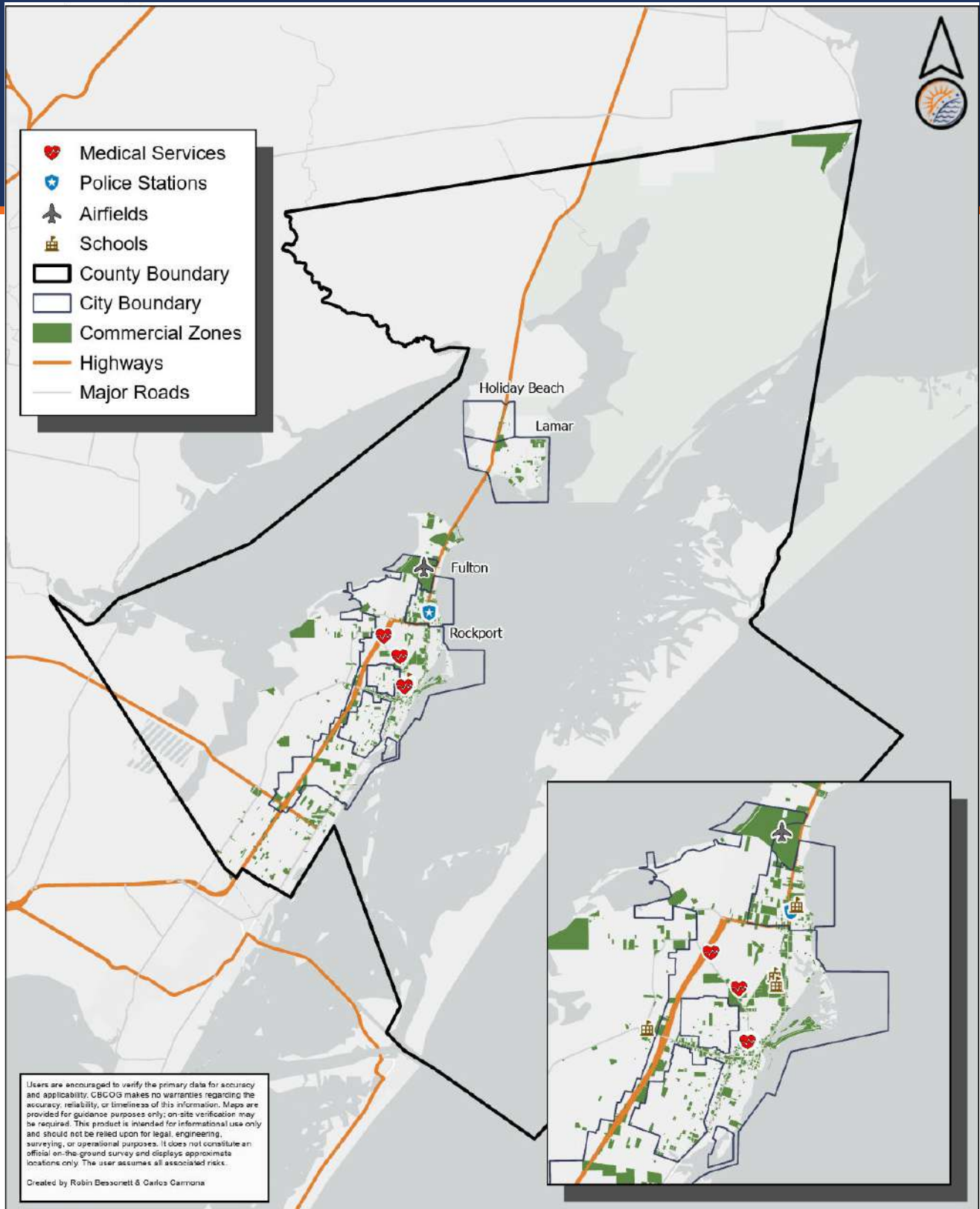
The regional economic development network is anchored by city/county EDCs and business partnerships that convene employers, identify project sites, and lead business retention/expansion: Aransas County Partnership EDC, Bee Area Partnership, Ingleside EDC, San Patricio County EDC, and Corpus Christi Regional EDC. These partners surface private-sector needs, coordinate permitting, and package local incentives for high-impact investments.

Local governments provide policy, land-use, and infrastructure alignment: Counties and cities coordinate capital planning, zoning, and right-of-way to de-risk project delivery. Industry representatives—ConocoPhillips and CBIP—advise on supply-chain localization, safety/quality standards, and workforce requirements, helping convert regional capabilities into purchase orders.

The region’s infrastructure and mobility partners include the Port of Corpus Christi—gateway for exports and project cargo—and the Corpus Christi MPO, which prioritizes freight corridors and resilience for USDOT funding. Water planning and reliability is led by the Nueces River Authority, aligning reuse/ASR, treatment, and conveyance improvements with growth areas. Environmental and coastal stewardship is represented by the Coastal Bend Bays & Estuaries Program and Harte Research Institute to integrate nature-based solutions and estuary health into capital plans.

Talent and innovation capacity comes from Del Mar College, Texas A&M University–Kingsville, TAMU–Corpus Christi, and Coastal Bend College, which co-design employer-aligned credentials, apprenticeships, and applied research. The Workforce Solutions Coastal Bend board coordinates sector partnerships, incumbent-worker upskilling, On-the-Job Training (OJT), and supportive services (childcare/transport). CACOST and other community providers help reach rural and underserved populations with wraparound services so residents can complete training and persist in employment.

Aransas Economic Region



Data sources: Esri, Tom Tom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), US. Department of Transportation (BTS NTAD, 2025). Esri U.S. Federal Datasets (2025). CBCOG

Aransas Economic Region SWOT Analysis

A strategic assessment identifying the region’s competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

★ Strengths

- Strong tourism, recreation, and coastal amenities, supported by a growing accommodation and food services sector, which generated over \$90 million in annual sales in 2022. [[census.gov](https://www.census.gov)]
- Significant agricultural output, with production agriculture contributing over \$257 million in economic output and 3,325 jobs, showing a diverse farm, ranch, and aquaculture base. [agecoext.tamu.edu]
- Steady population and income growth, including a 6.16% increase in median household income (2022–2023) and rising property values. [datausa.io]

S

! Weaknesses

- High poverty rate (18.7%), above state and national averages, indicating persistent economic vulnerability. [datausa.io]
- Aging population (median age 51) and a relatively low employment rate (48.3%), which may limit workforce availability. [data.census.gov]
- Infrastructure vulnerabilities, including limited healthcare access—highlighted by previous hospital closure impacts documented in regional resilience analyses. [storymaps.arcgis.com]

W

↑ Opportunities

- Growing diversification potential, including agribusiness expansion, coastal recreation, aquaculture, and nature based tourism. [agecoext.tamu.edu]
- Strengthening coastal resilience, bolstered by improved Coastal Resilience Index scores and new opportunities for hazard mitigation funding. [seagrant.noaa.gov]
- Increasing population growth (7.6% from 2010–2022) and strong homeownership rates signal a stable residential base attractive to new business development. [usafacts.org]

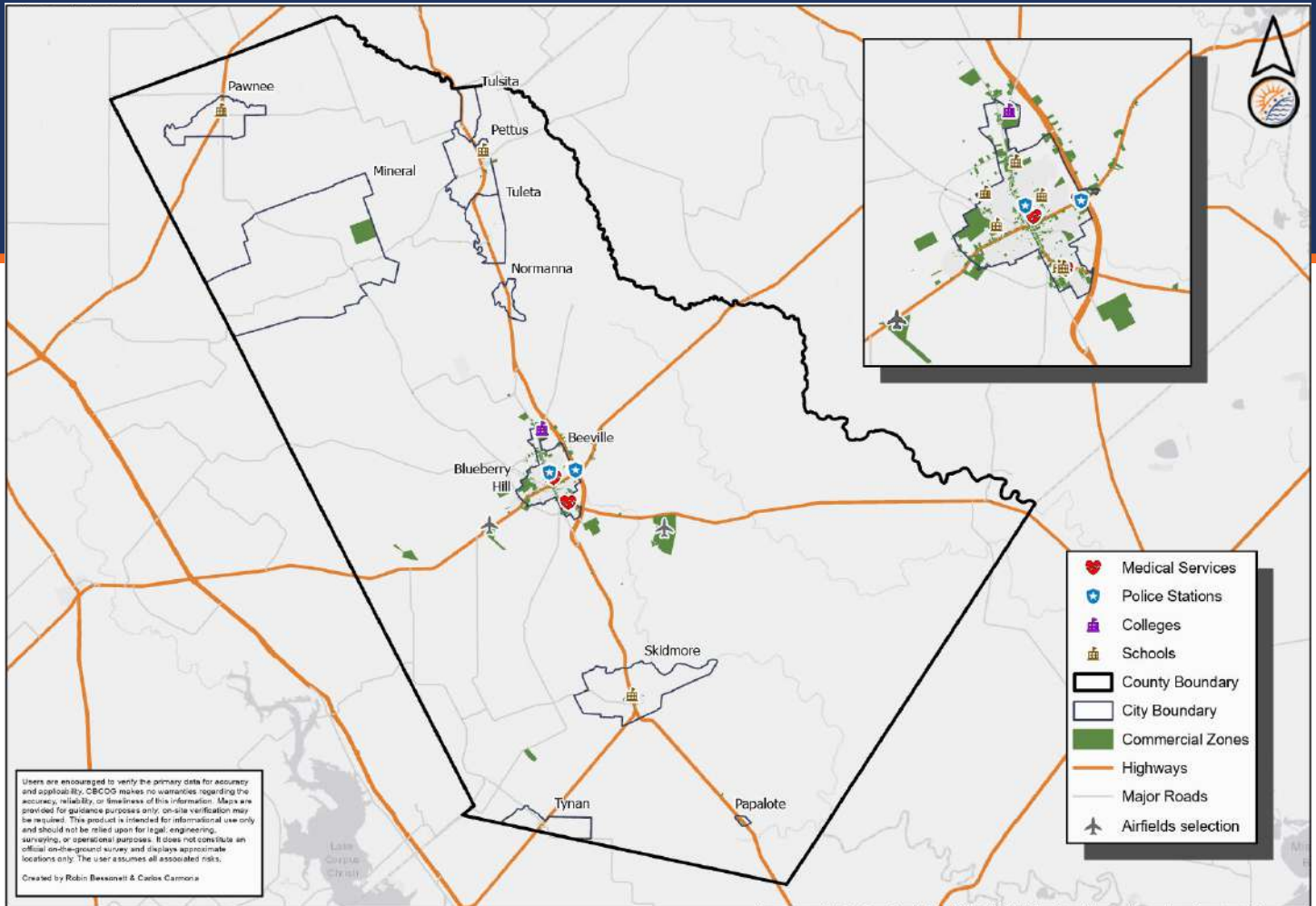
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⚠ Threats

- High exposure to hurricanes, sea level rise, and storm surge, documented in the Texas Coastal Resiliency Master Plan. [glo.texas.gov]
- Economic fluctuations tied to tourism and seasonal industries, which may leave the county vulnerable during downturns. (Supported by strong but concentrated service sector activity.) [lotscap.com]
- Environmental health risks and non point source pollution, which can affect water quality and coastal ecosystems essential to the local economy. (Linked to agriculture and coastal development.)

T

Bee County Economic Region



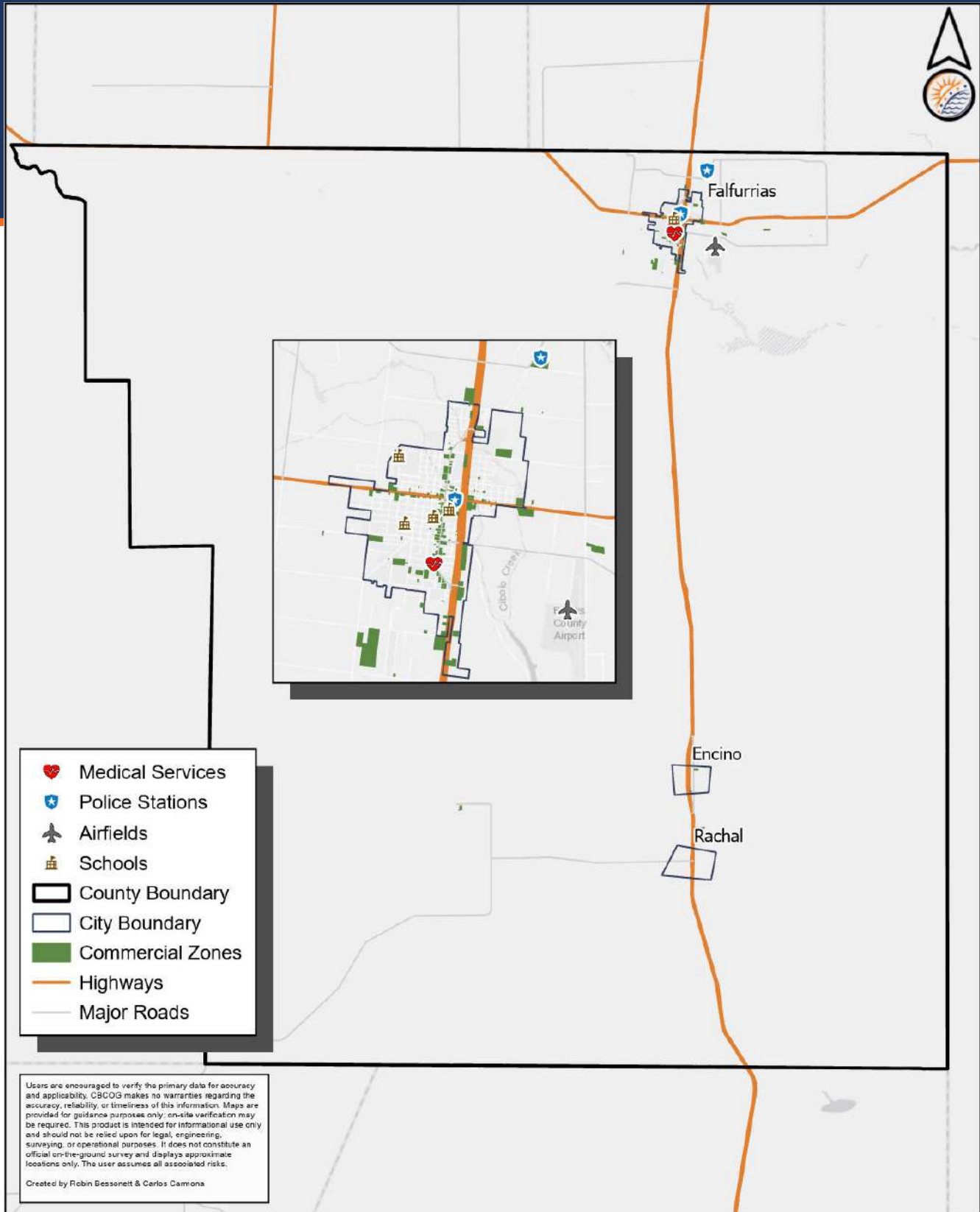
Data sources: Esri, Tom Tom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), U.S. Department of Transportation (BTS NTAD, 2025). Esri U.S. Federal Datasets (2025). CBCOG

Bee County Economic Region SWOT Analysis

A strategic assessment identifying the region’s competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths</p> <p><i>S</i></p> <ul style="list-style-type: none"> • Growing household income, with an 11.5% increase from 2022 to 2023, indicating improving economic conditions. [datausa.io] • Young median age (35.8) and strong presence of Coastal Bend College, supporting a locally trained workforce. [datausa.io] • High homeownership rate (72.1%) and relatively affordable housing compared to the state. [datausa.io] 	<p>! Weaknesses</p> <p><i>W</i></p> <ul style="list-style-type: none"> • Higher than average poverty rate (17–17.6%), signaling ongoing social and economic challenges. [datausa.io], [censusreporter.org] • Lower educational attainment, with only 14% holding a bachelor’s degree or higher, below state and national averages. [census.gov] • Limited economic diversity, with a significant share of jobs in government, education, and health—leaving the local economy sensitive to public sector shifts. [city-data.com]
<p>↑ Opportunities</p> <p><i>O</i></p> <ul style="list-style-type: none"> • Growing population stability, with steady year over year increases indicating long term residential viability. [datausa.io] • Strong Hispanic workforce base (61.4%), offering cultural and labor force strengths that can support business expansion. [census.gov] • Potential for workforce development, leveraging Coastal Bend College to expand training in skilled trades, healthcare, and emerging industries. [datausa.io] 	<p>⚠ Threats</p> <p><i>T</i></p> <ul style="list-style-type: none"> • Economic vulnerability, with low per capita income (\$24,011) and persistent poverty creating long term development challenges. [censusreporter.org] • Limited broadband access and digital disparities, which may hinder competitiveness in remote work and modern industry (indicated by lower subscription rates vs. state averages). [census.gov] • Exposure to regional economic shocks, including changes in state institutional employment and fluctuations in retail and service sector activity. [city-data.com]

Brooks Economic Region



0 3 6 Miles

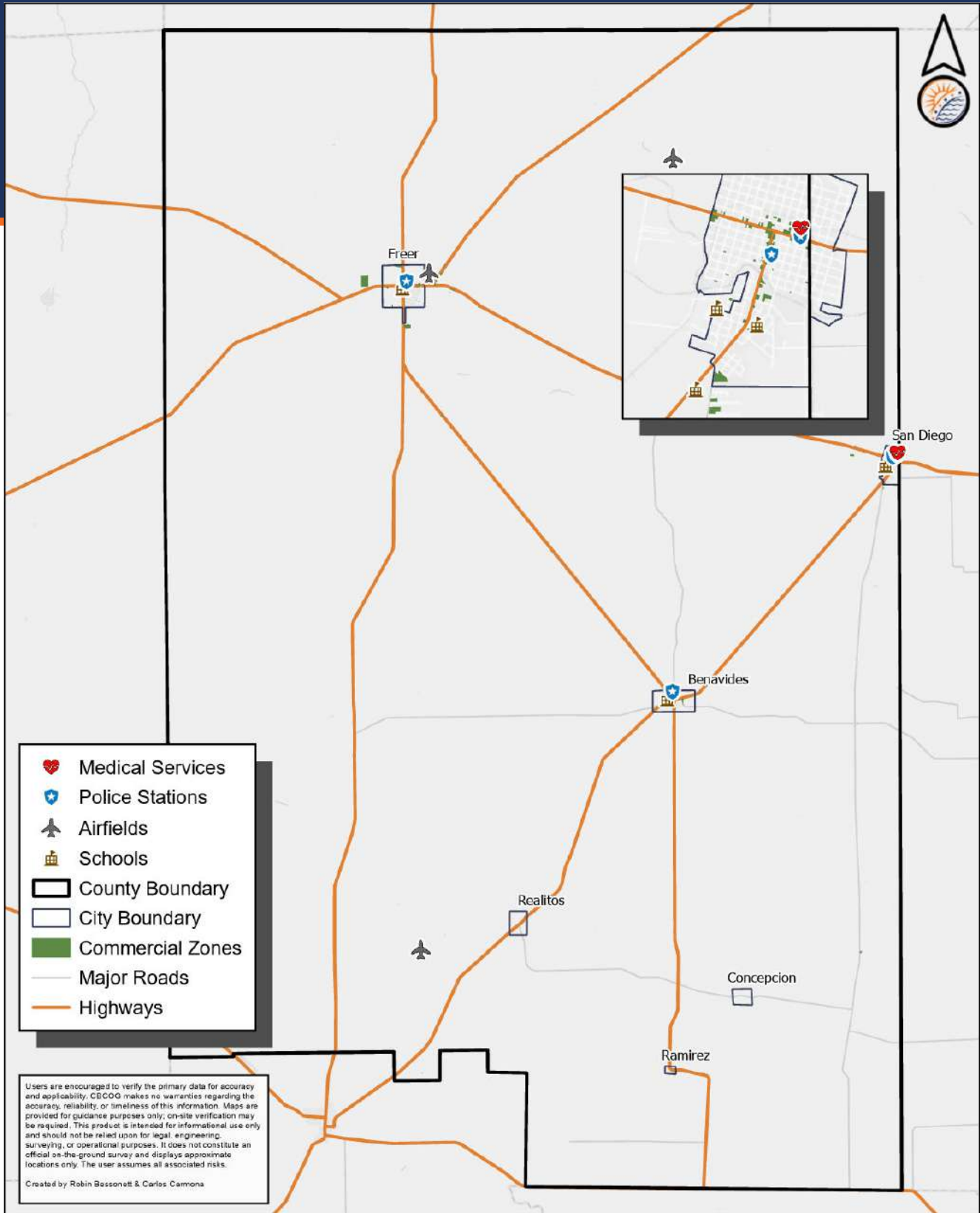
Data sources: Esri, Tom Tom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), U.S. Department of Transportation (BTS NTAD, 2025). Esri U.S. Federal Datasets (2025). CBCOG

Brooks County Economic Region SWOT Analysis

A strategic assessment identifying the region’s competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths S</p> <ul style="list-style-type: none"> • Strong cultural identity and majority Hispanic community (86.8%), supporting a cohesive local culture and bilingual workforce. [census.gov] • Low cost of living and affordable housing, with median home values around \$81,000–\$82,700, far below state and national averages. [census.gov], [datausa.io] • Growing employment rate, with a 12.5% increase in employed population (2022–2023) despite overall population decline. [datausa.io] 	<p>! Weaknesses W</p> <ul style="list-style-type: none"> • High poverty rate (30.7%), more than double the Texas average. [censusreporter.org] • Population decline (–5.4% since 2020) and ongoing out migration reducing workforce availability. [census.gov] • Low median household income (\$31,310) and limited higher education attainment (17% bachelor’s degree or higher). [datausa.io]
<p>↑ Opportunities O</p> <ul style="list-style-type: none"> • Agricultural expansion, with nearly 372,000 acres of farmland and an agriculture sector dominated by livestock (86% of sales), offering potential for value added processing. [data.nass.usda.gov] • Short commute times (14.7 minutes) and low congestion support business attraction and quality of life. [censusreporter.org] • Strategic location near major South Texas counties, creating opportunities for regional workforce, logistics, and energy partnerships. [datausa.io] 	<p>⚠ Threats T</p> <ul style="list-style-type: none"> • Continued population decline projected through 2029, threatening long term economic vitality. [worldpopulationreview.com] • Limited broadband adoption (78.9%), which may hinder digital access and modern industry growth. [census.gov] • Economic vulnerability, with low per capita income (~\$25,010) and high child poverty (38%), impacting overall community well being. [censusreporter.org]

Duval Economic Region



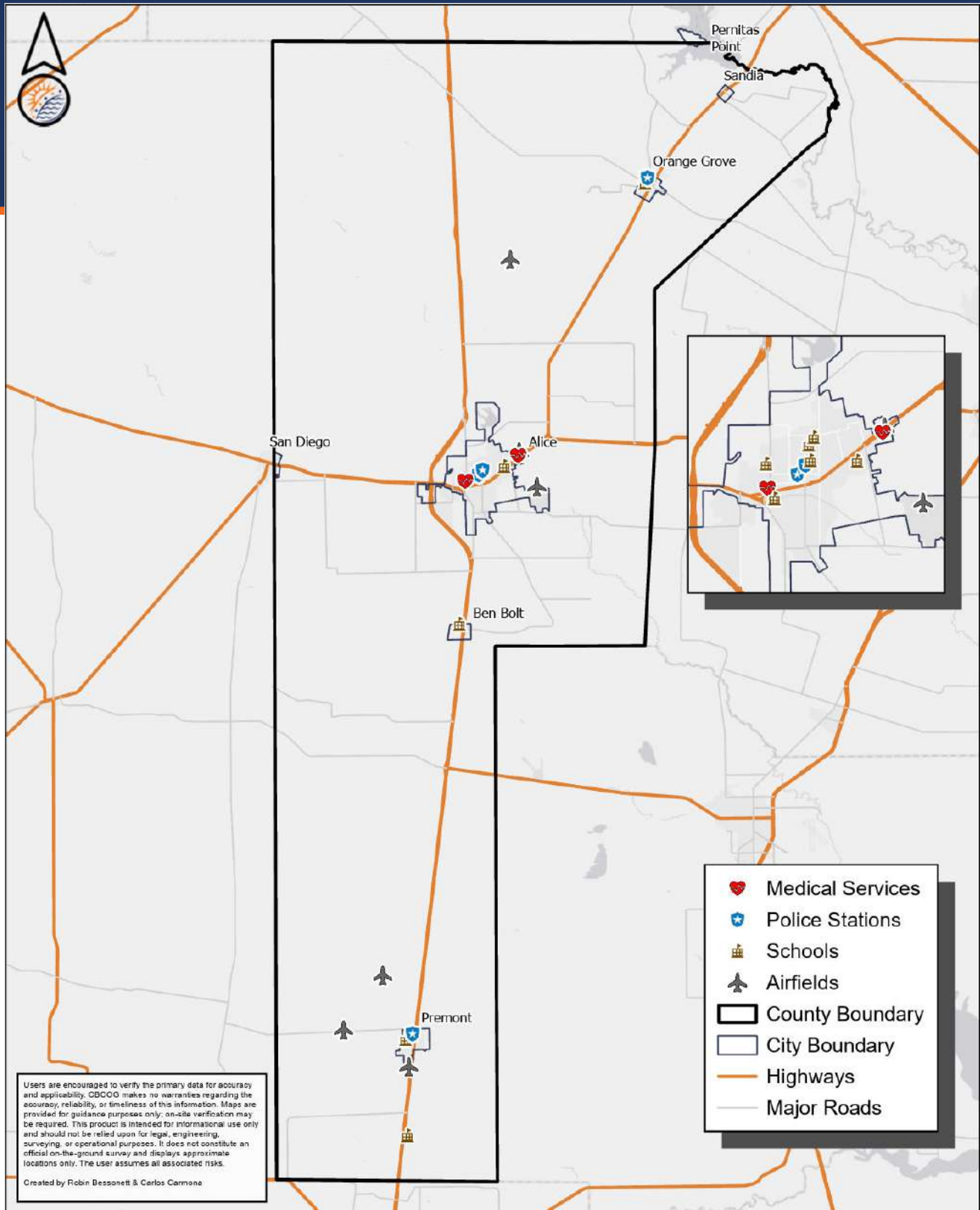
Data sources: Esri, Tom Tom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), US. Department of Transportation (BTS NTAD, 2025). Esri U.S. Federal Datasets (2025). CBCOG

Duval County Economic Region SWOT Analysis

A strategic assessment identifying the region’s competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths S</p> <ul style="list-style-type: none"> • Strong Hispanic cultural identity (81.9% Hispanic), supporting bilingual workforce capacity and cultural cohesion. [census.gov] • Affordable housing, with a median home value of around \$86,400–\$89,400, making the county attractive for low cost living. [census.gov], [datausa.io] • Significant agricultural and livestock sector, contributing over \$60.5 million in annual economic output and nearly 3,000 jobs. [agecoext.tamu.edu] 	<p>! Weaknesses W</p> <ul style="list-style-type: none"> • High poverty levels, with 29–33.3% of residents in poverty, more than double the state average. [datausa.io], [censusreporter.org] • Low educational attainment, with only 6.8% of adults holding a bachelor’s degree or higher, limiting access to higher skill industries. [census.gov] • Population decline, decreasing 2.5% since 2020, reducing workforce availability and long term growth potential. [census.gov]
<p>↑ Opportunities O</p> <ul style="list-style-type: none"> • Agricultural value added development, as the county already shows strong production in cow calf operations, hunting, and crop related output. [agecoext.tamu.edu] • Growing median property values, with a 13.7% increase from 2022 to 2023, indicating potential for investment and residential growth. [datausa.io] • Proximity to larger South Texas markets, including Brooks, Jim Wells, Webb, and Live Oak counties, enabling regional workforce and economic collaboration. [datausa.io] 	<p>⚠ Threats T</p> <ul style="list-style-type: none"> • Low broadband access, with only 68.9% of households having broadband subscriptions, limiting competitiveness in remote work and digital services. [census.gov] • Economic vulnerability, with per capita income (~\$22,146) far below state and national averages, increasing exposure to economic shocks. [censusreporter.org] • Long commute times (29.8 minutes) and low labor-force participation (47.5%) reduce productivity and overall economic output. [census.gov]

Jim Wells Economic Region



0 3 6 Miles

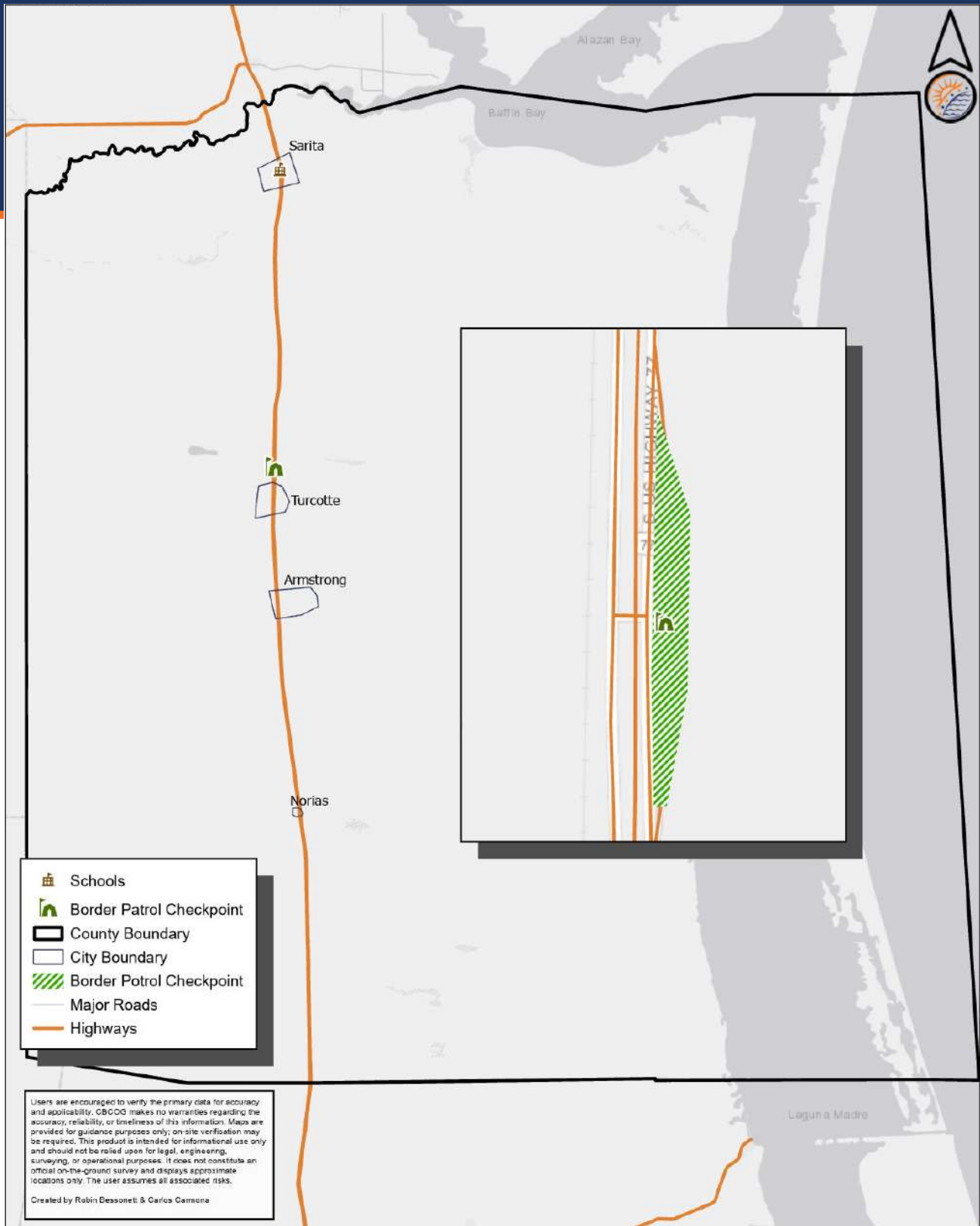
Data sources: Esri, Tom Tom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), US. Department of Transportation (BTS NTAD, 2025). Esri U.S. Federal Datasets (2025). CBCOG

Jim Wells Economic Region SWOT Analysis

A strategic assessment identifying the region’s competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths S</p> <ul style="list-style-type: none"> • Large and diverse labor force, with 15,280 employed residents and strong representation across service, retail, and agriculture sectors. [datausa.io] • Affordable housing, with a median property value of \$104,800, significantly below state and national averages. [datausa.io] • Strategic location, bordering major South Texas counties (Nueces, San Patricio, Live Oak), creating access to regional job markets and supply chains. [datausa.io] 	<p>! Weaknesses W</p> <ul style="list-style-type: none"> • High poverty rate (23.2–24.7%), well above Texas and U.S. averages. [datausa.io], [censusreporter.org] • Lower educational attainment, with only 16.3% holding a bachelor’s degree or higher, limiting access to high skill industries. [census.gov] • Stagnant population growth, with a near zero change since 2020 and slight yearly declines. [census.gov]
<p>↑ Opportunities O</p> <ul style="list-style-type: none"> • Strong agricultural foundation, with over 398,000 acres of farmland and significant crop and livestock production valued at more than \$72 million annually. [nass.usda.gov] • Retail and service sector expansion, supported by \$715 million in annual retail sales, suggesting room for business growth. [census.gov] • Proximity to the Corpus Christi metro, enabling workforce mobility, logistics development, and potential employer attraction. [datausa.io] • Increasing property values (14.4% annual growth) signal investment potential and community stabilization. [datausa.io] 	<p>⚠ Threats T</p> <ul style="list-style-type: none"> • Persistent economic vulnerability, with high child poverty rates (39%) and continued reliance on lower wage industries. [censusreporter.org] • Healthcare access challenges, with 19.1% uninsured under age 65, affecting workforce readiness. [census.gov] • Limited broadband access (75.5%), which may restrict digital workforce development and business competitiveness. [census.gov] • Exposure to regional economic fluctuations, especially in agriculture and retail, which make up a large share of the county economy. [nass.usda.gov]

Kenedy Economic Region



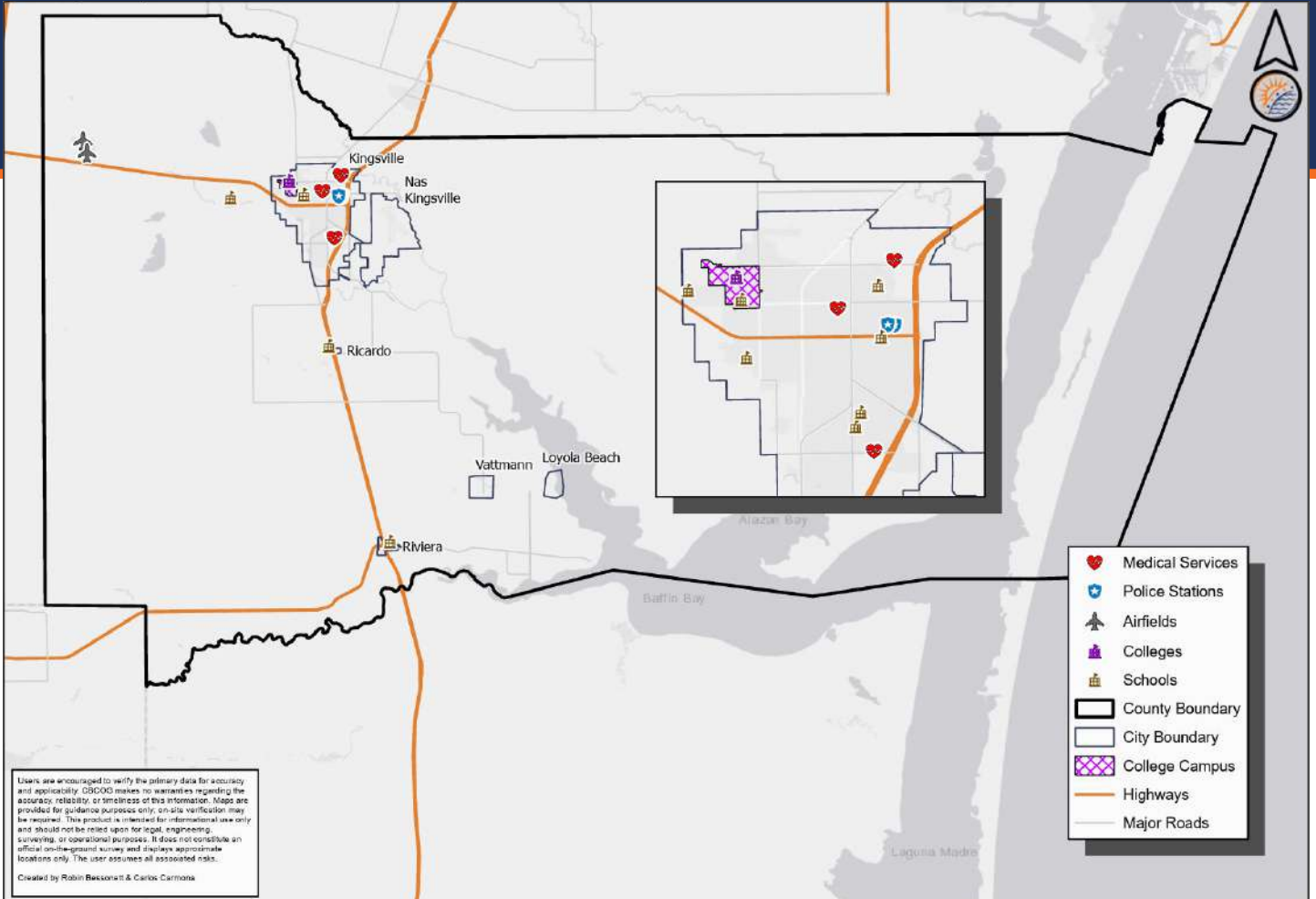
Data sources: Esri, Tom Tom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), US. Department of Transportation (BTS NTAD, 2025). Esri U.S. Federal Datasets (2025). CBCOG

Kenedy County Economic Region SWOT Analysis

A strategic assessment identifying the region's competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths</p> <ul style="list-style-type: none"> • Unique cultural and linguistic identity: Nearly 71% Hispanic/Latino and 87.6% of residents speak a non English language at home, indicating strong cultural cohesion. [census.gov] • Extremely low population density creates opportunities for conservation, ranching, and large scale land stewardship across 1,458 square miles • Median household income (\$38,882), while low compared to the state, is paired with lower-than-expected poverty levels (15.3%), suggesting some income stability among long term residents. [censusreporter.org] 	<p>! Weaknesses</p> <ul style="list-style-type: none"> • Rapid population decline: The county lost 6% between 2023–2024 and has experienced sharp drops across the past decade, [usafacts.org] [census.gov] • Very low educational attainment, with only 52.8% high school completion and 13% holding a bachelor's degree, both far below state averages. [census.gov] • High uninsured rate (29.2%) and limited healthcare access. [census.gov] • Small labor force (44.8% workforce participation), limiting local economic diversification. [census.gov] • Low broadband access (69.1%) hinders remote work, digital services, and education. [census.gov]
<p>↑ Opportunities</p> <ul style="list-style-type: none"> • Large ranchlands and vast open space offer opportunities for wildlife conservation, ecotourism, hunting leases, land stewardship programs, and renewable energy development (wind/solar). • Strategic location near major South Texas counties (Hidalgo, Kleberg, Willacy, Brooks) supports regional workforce partnerships and shared services. [datausa.io] • Opportunity for rural development investment, as the county is among the least populated in the U.S., making it eligible for targeted state and federal rural assistance programs (infrastructure, broadband, health). 	<p>⚠ Threats</p> <ul style="list-style-type: none"> • Extreme population decline threatens long term community viability, service availability, and tax base stability. Kenedy County has lost more than 24% of its population between 2014–2024. [usafacts.org] • Aging population (median age 54.8–65.5) increases pressure on limited healthcare and social services. [censusreporter.org], [datausa.io] • Limited economic activity: no measurable data for retail, transportation, healthcare, or accommodation sales, reflecting the extremely small commercial base. [census.gov] • Climate risks, including drought, hurricanes, and heat, which can disproportionately impact ranchlands and low population rural environments.

Kleberg Economic Region



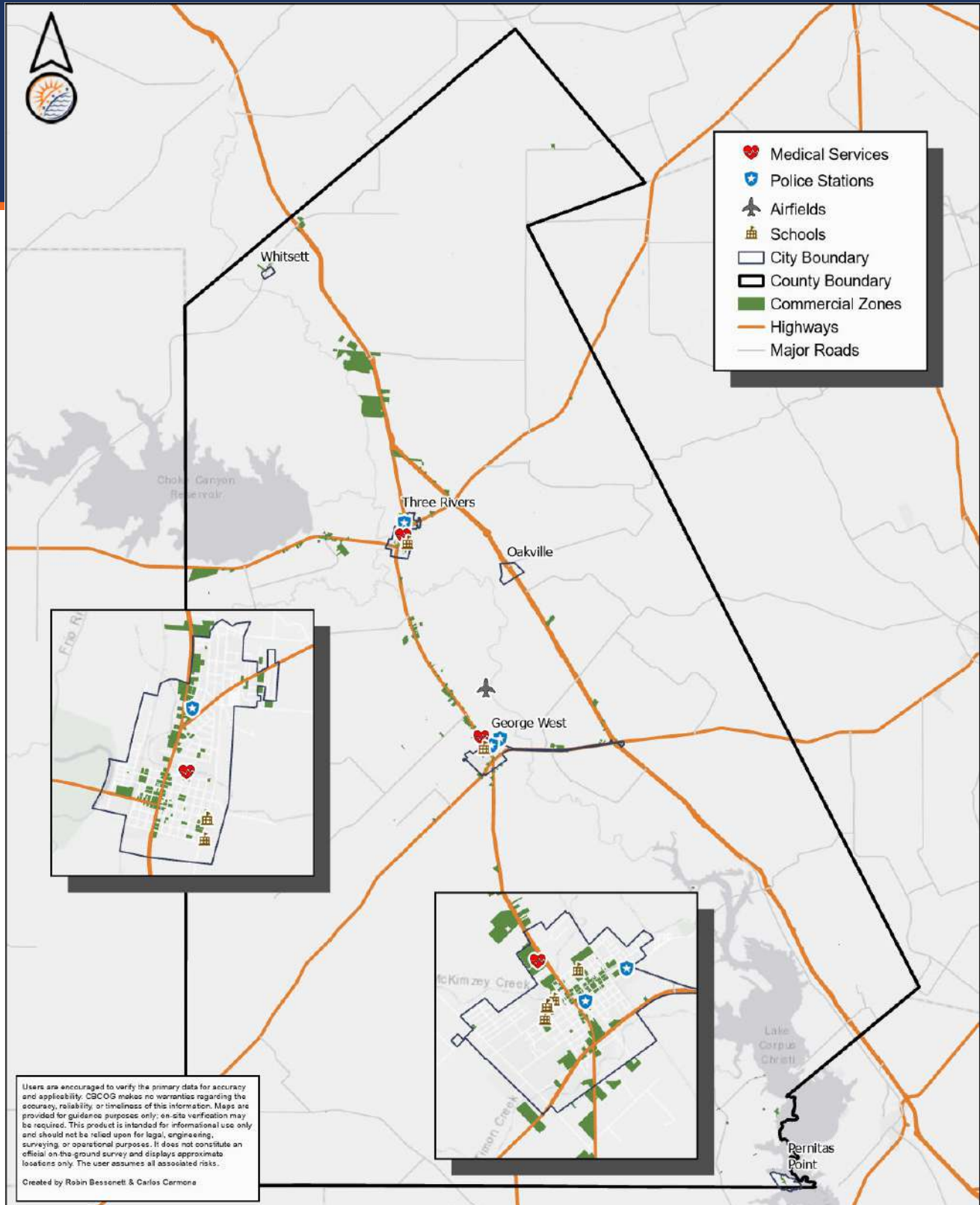
Data sources: Esri, Tom Tom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), US. Department of Transportation (BTS NTAD, 2025), Esri U.S. Federal Datasets (2025). CBCOG

Kleberg Economic Region SWOT Analysis

A strategic assessment identifying the region’s competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths</p> <ul style="list-style-type: none"> • Growing household income, with median household income rising to \$57,612 in 2023—a 9.76% increase from the prior year. [datausa.io] • Young population (median age ~29–30) driven by the presence of Texas A&M University–Kingsville, which awarded 1,510 degrees in 2023, supporting workforce development. [datausa.io] • Affordable housing, with a median home value of \$152,200–\$161,300, still below the Texas median despite recent growth. [datausa.io], [census.gov] • Robust retail base, generating \$605.9 million in sales (2022) and nearly \$19,948 per capita—a major revenue contributor. [census.gov] 	<p>! Weaknesses</p> <ul style="list-style-type: none"> • High poverty rate (28–28.8%), more than double the Texas and U.S. averages. [censusreporter.org], [datausa.io] • Low per capita income (\$26,395), significantly below state and national levels. [censusreporter.org] • Heavy reliance on government sector, which accounts for 34.4% of county GDP, indicating limited private sector diversification. [lotscap.com] • Moderate population decline, with a 1.9% decrease since 2020. [census.gov]
<p>↑ Opportunities</p> <ul style="list-style-type: none"> • University driven economic development: Texas A&M–Kingsville presents opportunities for research partnerships, talent retention, innovation incubators, and workforce pipelines. [datausa.io] • Tourism and coastal proximity, leveraging nearby beaches, wildlife areas, ranchlands, and cultural heritage to expand hospitality and visitor based revenue. • Retail and service sector expansion, supported by strong per capita retail spending and regional demand. [census.gov] • Room for new private sector investment, particularly in manufacturing, energy, logistics, and business services, to counterbalance high government sector dependence. [lotscap.com] 	<p>⚠ Threats</p> <ul style="list-style-type: none"> • Persistent poverty and high child poverty (40%), which strain schools, healthcare, and social services. [censusreporter.org] • High social vulnerability, ranking more vulnerable than 88% of Texas counties, especially in housing and transportation access. [texascommunityhealthnews.org] • Healthcare access issues, with 18.8% uninsured under age 65, higher than the state average. [census.gov] • Slow economic growth, with GDP growing at only 0.1%, far below the Texas rate. [lotscap.com]

Live Oak Economic Region



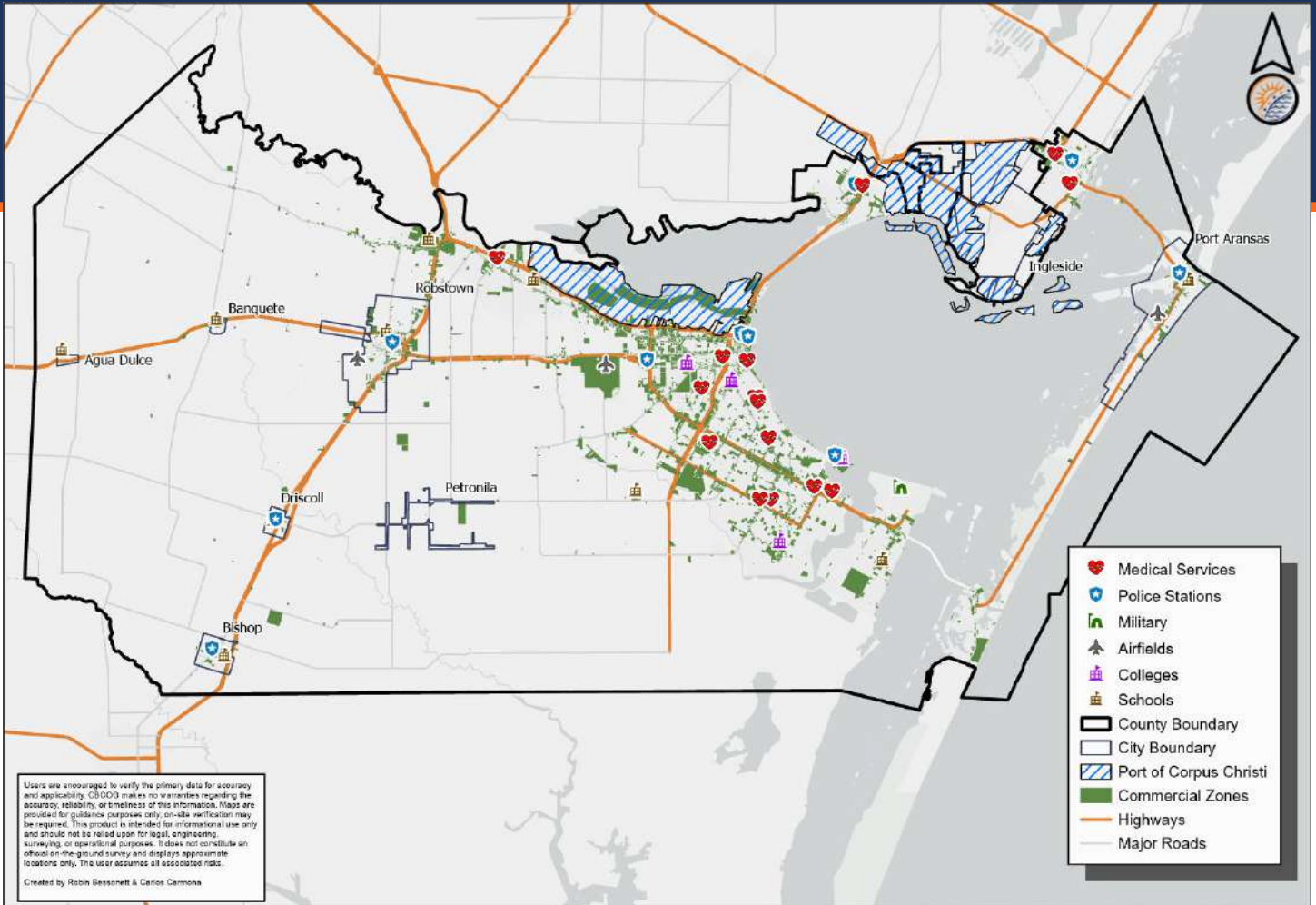
Data sources: Esri, TomTom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), US. Department of Transportation (BTS NTAD, 2025), Esri U.S. Federal Datasets (2025). CBCOG

Live Oak Economic Region SWOT Analysis

A strategic assessment identifying the region’s competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths</p> <ul style="list-style-type: none"> • Growing population, with a 5.6% increase since 2020 (2020–2024). [census.gov] • High homeownership rate (72.9%), indicating residential stability. [datausa.io] • Strong retail activity, with over \$338 million in annual retail sales and \$29,288 per capita, one of the highest per capita sales rates in the region. [census.gov] • Economic activity tied to transportation/warehousing, generating \$198.6 million in receipts (2022). [census.gov] 	<p>! Weaknesses</p> <ul style="list-style-type: none"> • Low labor force participation (43%), significantly below Texas and U.S. averages. [census.gov] • Higher-than-average poverty (17.1–17.2%), especially among seniors (19%) and children (18–20%). [censusreporter.org], [datahood.ai] • Lower educational attainment, with only 15.9% holding a bachelor’s degree or higher. [census.gov] • Limited population density (11 people per sq. mile), which constrains economies of scale and service delivery. [censusreporter.org]
<p>↑ Opportunities</p> <ul style="list-style-type: none"> • Positive net migration, with 139 new residents added between 2023–2024, driven by both immigration and domestic movement. [usafacts.org] • Available housing stock, with nearly 6,065 units and relatively affordable values (median \$159,200). [census.gov] • Growing commercial traffic and logistics capacity, supported by high receipts in the transportation/warehousing sector. [census.gov] • Proximity to multiple counties (Atascosa, Bee, Jim Wells, San Patricio, Duval, Karnes, McMullen) supports regional planning partnerships and expanded service markets. [datausa.io] 	<p>⚠ Threats</p> <ul style="list-style-type: none"> • Negative natural population change, with deaths exceeding births by 45 (2023–2024). [usafacts.org] • Healthcare vulnerabilities, including 20.9% uninsured under age 65, above state averages. [census.gov] • Economic dependency on a few key sectors (e.g., transportation/warehousing, retail), risking instability during downturns. [census.gov] • Aging population, with a growing senior share that may increase future demand for healthcare and social services. [census.gov], [veritasx.us]

Nueces Economic Region



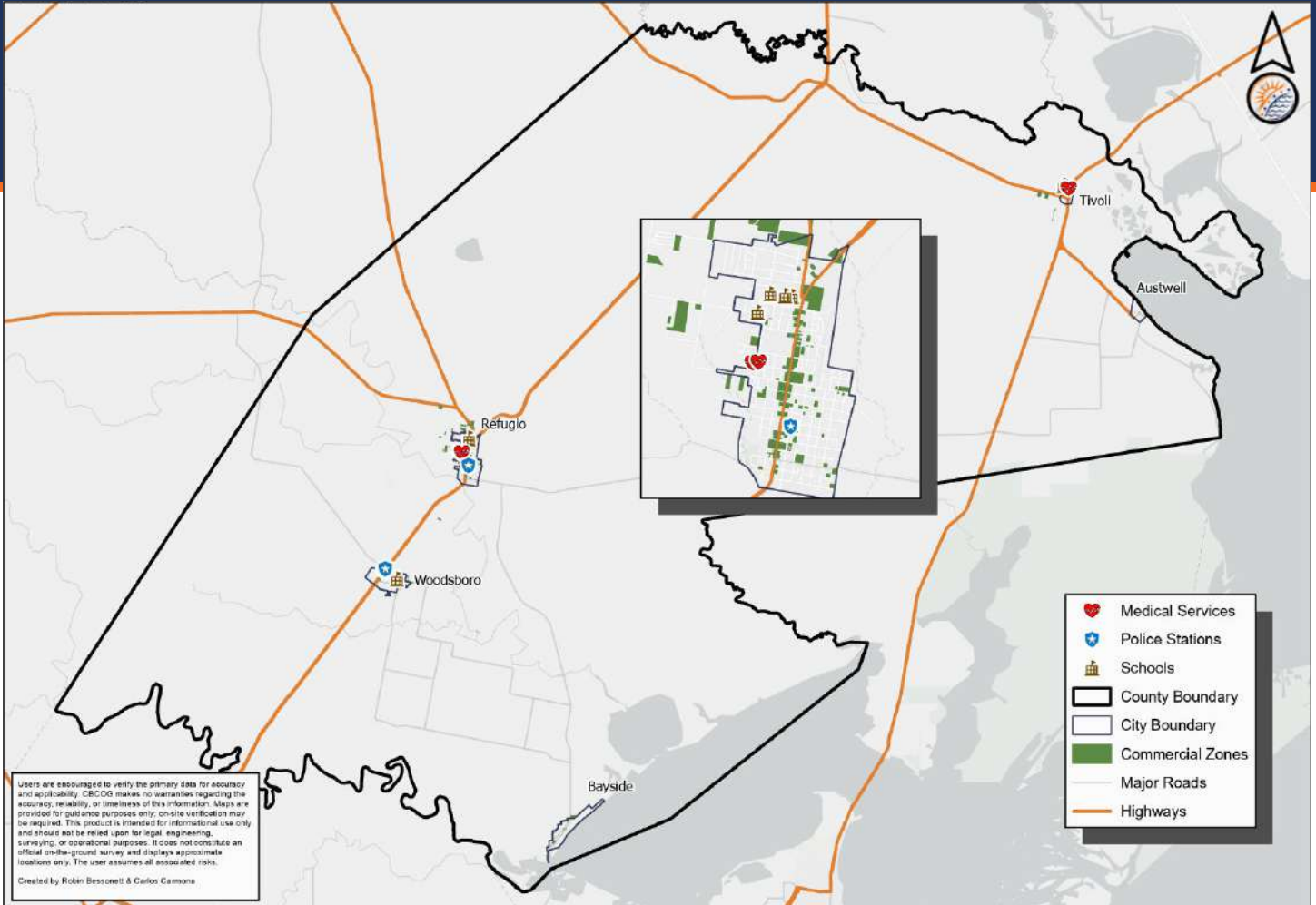
Data sources: Esri, Tom Tom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), US. Department of Transportation (BTS NTAD, 2025). Esri U.S. Federal Datasets (2025). CBCOG

Nueces County Economic Region SWOT Analysis

A strategic assessment identifying the region’s competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths</p> <ul style="list-style-type: none"> • Large and stable population (~353,125 in 2024), making Nueces one of the largest and most economically influential counties in South Texas. [census.gov] • Diverse and growing Hispanic community (63.4%), providing a strong bilingual workforce and cultural vitality. [census.gov] • Rising household income, up to \$66,021 in 2023, with continued year-over-year growth (3.11%). [datausa.io] • Strong employment base, with 165,000+ employed residents as of late 2025. [datacommons.org] • Significant coastal assets—Port of Corpus Christi, tourism, energy infrastructure—support long-term economic competitiveness. 	<p>! Weaknesses</p> <ul style="list-style-type: none"> • Persistent poverty: 17.1–17.7% overall poverty rate, higher than Texas and U.S. averages. [censusreporter.org], [datausa.io] • High child poverty (25–26%), reflecting deep socioeconomic disparities. [censusreporter.org], [datahood.ai] • Housing affordability challenges, with median home values reaching \$208,800–\$213,500, rising faster than incomes. [census.gov], [city-data.com] • Social vulnerability, higher than 74% of Texas counties, driven heavily by race/ethnicity and housing/transportation factors. [texascommunityhealthnews.org]
<p>↑ Opportunities</p> <ul style="list-style-type: none"> • Port of Corpus Christi expansion, one of the largest energy export hubs in the U.S., will drive job creation in logistics, petrochemicals, and renewable energy. (Supported by strong county transportation/warehousing revenues at \$1.18B). [census.gov] • Growing higher education pipeline, with TAMU–CC and Del Mar College supporting workforce development in: STEM fields Healthcare Engineering and maritime industries • Expanding healthcare economy, with over \$4.07B in annual healthcare revenue, suggests opportunity for hospital expansion, medical training, and senior care services. [census.gov] • Rising property values (9.57% annual growth) may attract investors and increase tax revenue capacity for local governments. [datausa.io] 	<p>⚠ Threats</p> <ul style="list-style-type: none"> • Population stagnation, with slight annual declines (–0.118% between 2022–2023). [datausa.io] • Climate vulnerability, including hurricanes, coastal flooding, and long-term erosion risks along the Gulf Coast. • Housing affordability pressures, given rising home values and increasing rental costs (\$1,283 median rent). [census.gov] • High uninsured rate (18.4%), above state and national levels, straining health systems. [census.gov]

Refugio Economic Region



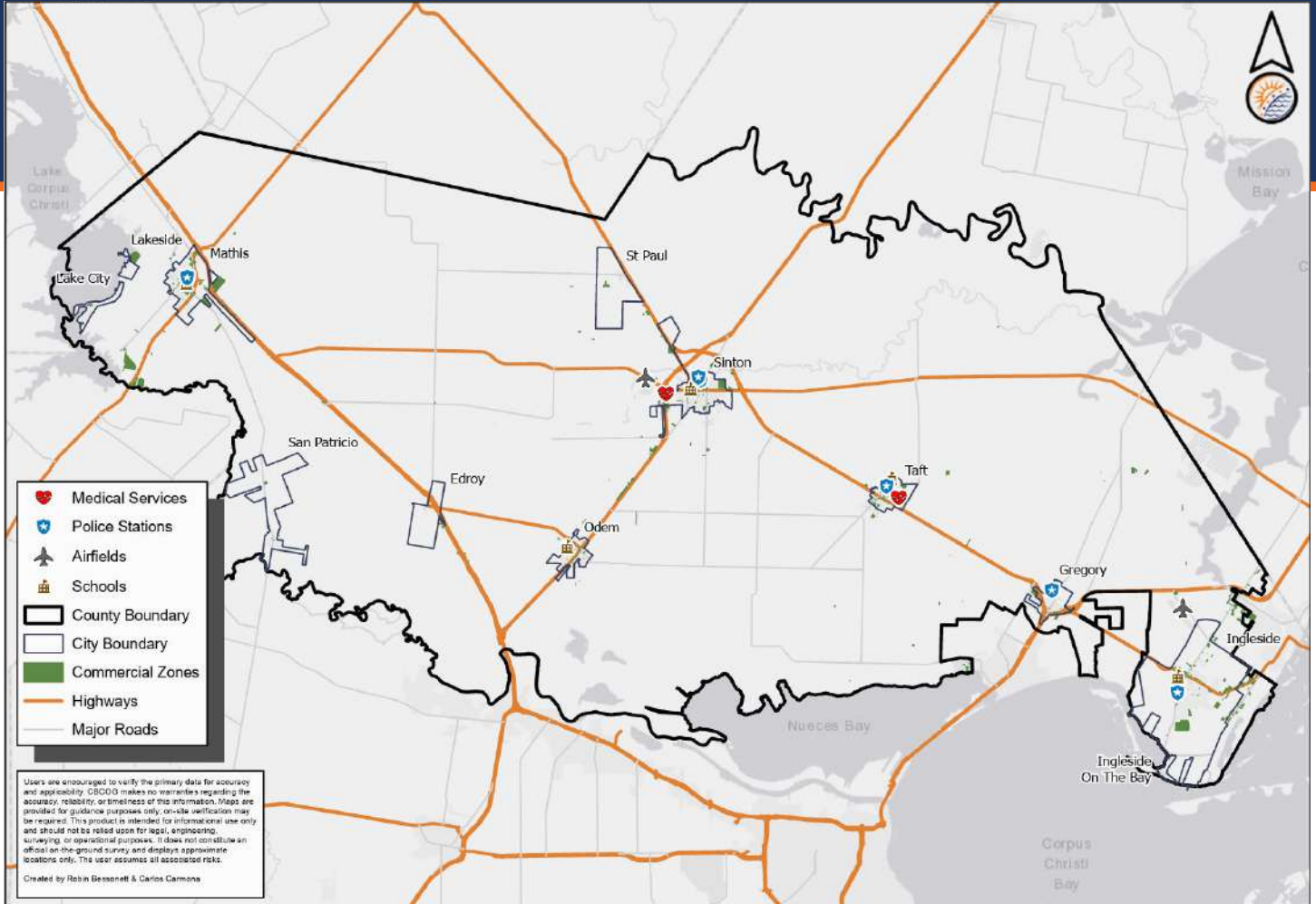
Data sources: Esri, Tom Tom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), U.S. Department of Transportation (BTS NTAD, 2025). Esri U.S. Federal Datasets (2025). CBCOG

Refugio Economic Region SWOT Analysis

A strategic assessment identifying the region’s competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths</p> <ul style="list-style-type: none"> Stable population: Population remained essentially unchanged from 2020 (6,741) to 2024 (6,739). [census.gov] Strong homeownership (77–78%), well above state averages, indicating strong housing stability. [census.gov], [datausa.io] Affordable housing, with a median home value of \$94,400–\$99,000, significantly below Texas norms. [census.gov], [datausa.io] Growing household income, rising 6.84% year over year to \$58,016 in 2023. [datausa.io] 	<p>! Weaknesses</p> <ul style="list-style-type: none"> Aging population, with 22.2–22.5% aged 65+, well above the state median. [census.gov], [veritasx.us] High child poverty (24–25%), significantly above U.S. averages. [censusreporter.org], [datahood.ai] Lower educational attainment, with only 14% holding a bachelor’s degree. [census.gov] Shrinking long term population, down 8.5% from 2014–2024. [usafacts.org] Labor force participation of only 50–52%, below state averages. [census.gov], [data.census.gov]
<p>↑ Opportunities</p> <ul style="list-style-type: none"> Strong GDP growth (14.9% in 2022) driven by goods producing sectors. [lotscap.com] Low cost of living (index 78.8) may attract retirees and remote workers. [city-data.com] Strategic location, positioning it to benefit from regional industry, ports, and energy/logistics corridors. [datausa.io] Major sectors such as energy, agriculture, and transportation show strong revenue and job potential (e.g., transportation/warehousing generated \$17.2M in 2022). [census.gov] Strong resident retention, with 84% living in the same home after one year, providing stability for community based development. [census.gov] 	<p>⚠ Threats</p> <ul style="list-style-type: none"> Ongoing natural population decline, with deaths exceeding births by 32 in 2023–2024. [usafacts.org] Economic risk from dependence on goods producing industries, which can be volatile (oil & gas, agriculture). [lotscap.com] Rising poverty (17.3%), higher than the state and national averages. [datausa.io], [censusreporter.org] Small population base, which limits economies of scale for healthcare, education, and workforce development. Potential climate vulnerability, due to hurricane exposure and proximity to the Gulf Coast.

San Patricio Economic Region



Data sources: Esri, Tom Tom, Garmin, FAO, NOAA, ISGS, ©OpenStreetMap contributors, Texas Department of Transportation (2025), U.S. Department of Transportation (BTS NTAD, 2025), Esri U.S. Federal Datasets (2025), CBCOG

San Patricio Economic Region SWOT Analysis

A strategic assessment identifying the region’s competitive assets, persistent challenges, emerging prospects, and external risks — developed to guide goal-setting and priority action over the next five-year planning cycle.

<p>★ Strengths</p> <ul style="list-style-type: none"> • Growing population: The county reached 71,467 residents in 2024, a 3.9% increase since 2020. [census.gov] • Continued annual growth: Between 2023–2024 the county gained 697 new residents, driven primarily by immigration and positive domestic migration. [usafacts.org] • Strong and rising household income, with median income at \$67,512 in 2023, up 5.75% year over year. [datausa.io] • High homeownership (66–67%) and moderate housing costs (median home value \$180,400–\$192,400). [census.gov], [datausa.io] • Significant industrial and logistics activity, supported by proximity to the Port of Corpus Christi and major petrochemical investments (e.g., steel, LNG, and plastics). 	<p>! Weaknesses</p> <ul style="list-style-type: none"> • Low bachelor’s degree attainment (17.5%), below state and national averages. [census.gov] • Per capita income (\$35,226) is only ~80% of state and U.S. levels. [censusreporter.org] • Higher uninsured rate (18.3%) compared to national averages. [census.gov] • Significant social vulnerability, with the county more vulnerable than 78% of Texas counties, driven by household age/disability/language factors. [texascommunityhealthnews.org] • Dependence on volatile industries, especially petrochemical manufacturing, energy, construction, and logistics, which are sensitive to global market fluctuations.
<p>↑ Opportunities</p> <ul style="list-style-type: none"> • Economic diversification via industrial expansion, including steel manufacturing, plastics, LNG terminals, and port aligned supply chain development. • Affordable housing market compared to Texas overall (median home value ~\$193k vs. state median ~\$297k). [city-data.com] • Strategic regional location, ideal for regional collaboration in workforce, transportation, and emergency management. [datausa.io] • WIndustrial employment concentration in education & health services and trade/transport/logistics offers opportunities for workforce partnerships and training programs. [interchange.puc.texas.gov] 	<p>⚠ Threats</p> <ul style="list-style-type: none"> • Environmental and climate vulnerabilities, particularly hurricanes and storm surge risks due to proximity to the Gulf and major industrial corridors. • Increased strain on infrastructure, as population grows but roads, water systems, broadband, and schools lag behind the pace of development. • Potential over reliance on port dependent and petrochemical industries, which expose the county to market volatility, regulatory changes, and shifts toward decarbonization.

STAKEHOLDER SURVEY

Coastal Bend CEDS 2026 Update

General Vision & Priorities

1. What are the top three economic development priorities for your community over the next five years?
2. How well do you think the current CEDS reflects the needs and opportunities of your community?
3. What emerging trends or challenges should be addressed in the next CEDS?

Infrastructure & Resilience

4. What types of infrastructure investments are most needed in your area (e.g., broadband, transportation, water systems)?
5. How prepared is your community for natural disasters or economic disruptions?
6. What additional strategies could improve regional resilience?

Workforce & Education

7. What are the most critical workforce gaps in your region?
8. How can the next CEDS better support workforce development and training programs?
9. Are there specific industries or occupations that should be prioritized for workforce investment?

Economic Sectors & Innovation

10. Which industry sectors should be a focus for future economic growth in the Coastal Bend?
11. How can the region better support entrepreneurship and small business development?
12. What role should innovation and technology play in the region's economic strategy?

Community Well-Being

13. What are the biggest barriers to economic opportunity in your community?
14. What quality-of-life improvements would help retain and attract residents?

Collaboration & Implementation

15. How can regional collaboration be improved among local governments, businesses and nonprofits?
16. What role should your organization or community play in implementing the next CEDS?
17. What metrics or outcomes should be used to measure success?

STAKEHOLDER SURVEY

Executive Summary: CEDS Survey Findings

This executive summary presents key findings from the Comprehensive Economic Development Strategy (CEDS) survey conducted in preparation for the 2026 planning cycle. The survey gathered input from stakeholders across the Coastal Bend region, focusing on the validity of SWOT elements, feedback on goals and objectives, and priority issues for the next CEDS plan.

SWOT Validity

- **Strengths:** 86% of respondents agreed or strongly agreed that the listed strengths remain valid.
- **Weaknesses:** 97% agreed or strongly agreed.
- **Opportunities:** 86% agreed or strongly agreed.
- **Threats:** 93% agreed or strongly agreed.

Themes from Open-Ended Responses

Strengths to Add

- Workforce skills (technical, industrial)
- Proximity to major cities (San Antonio, Houston)
- Eco-tourism and mariculture
- Education assets (universities and colleges)

Weaknesses to Add

- Water scarcity and infrastructure
- Mental health and substance abuse access
- Lack of vocational training and skilled trades
- Rural infrastructure gaps (rail, electric, commercial buildings)

Opportunities to Add

- Regional marketing and supplier development
- Urban infill and downtown revitalization
- Attracting new Texas residents to South Texas
- Carbon capture and data mining

Weaknesses to Eliminate

- COVID-19-related issues
- Broadband (seen as improved)
- General infrastructure concerns (need specificity)

Threats to Add

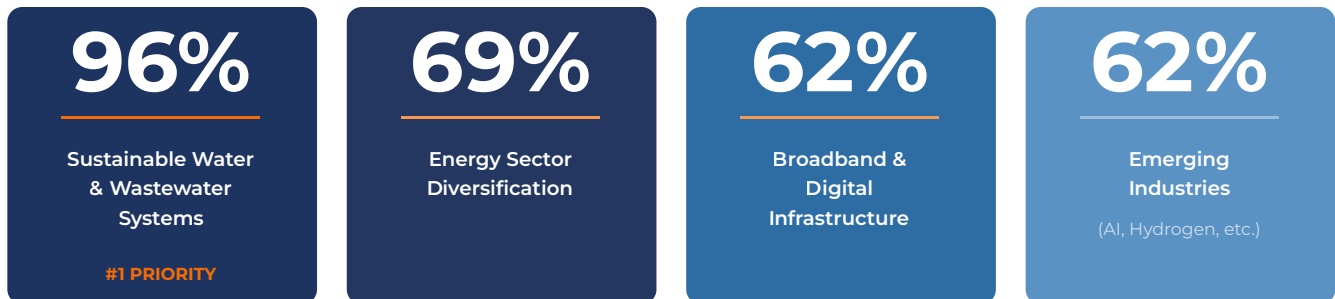
- Cybersecurity
- Border-related trafficking and safety
- Aging infrastructure
- Insurance market instability
- Water supply and energy availability



Goals and Objectives Feedback

- Over 90% support continuing Goals 1–4.
- Suggested modifications include rural inclusion, cross-county collaboration, disaster resilience, and improved clarity.
- Progress on objectives rated moderate to low, with concerns about visibility, rural neglect, and siloed efforts.

Priority Issues for Next CEDS Plan



Additional suggestions included passenger rail, supplier development, eco-tourism, cybersecurity, and mental health services.



Alignment With the Texas State Economic Development Strategic Plan (2025–2029)

The Coastal Bend’s CEDS is strongly aligned with the priorities outlined in the State of Texas’ Bigger. Better. Texas. Economic Development Strategic Plan for 2025–2029—anchored by four pillars: Business & Industry, Innovation & Entrepreneurship, Workforce, and Infrastructure.

The Coastal Bend region’s Comprehensive Economic Development Strategy (CEDS) is strongly aligned with the priorities outlined in the State of Texas’ Bigger. Better. Texas. Economic Development Strategic Plan for 2025–2029. The statewide plan emphasizes four major pillars—Business & Industry, Innovation & Entrepreneurship, Workforce, and Infrastructure—which collectively guide Texas toward long term competitiveness, job creation, and regional resilience. These pillars are reinforced by statewide commitments to regional collaboration, resilience, global competitiveness, and broad-based prosperity, themes that are deeply embedded in the Coastal Bend’s regional goals. The state plan is explicit that economic development in Texas “is a team sport,” requiring coordinated efforts across local, regional, and state partners to ensure that the benefits of growth reach all communities. This principle forms the backbone of the Coastal Bend CEDS and is reflected across all five of its major goals.

Alignment With Goal 1: Sustainable Infrastructure

The Coastal Bend’s focus on expanding modern water and wastewater systems, improving drainage and transportation infrastructure, and increasing broadband access is fully aligned with the State Plan’s Infrastructure pillar. The statewide blueprint prioritizes improving regional connectivity, strengthening critical infrastructure systems, and enhancing climate and disaster resilience across Texas.

Furthermore, the region’s emphasis on supporting strategic, future-facing infrastructure—such as desalination, rail connectivity, and clean energy—aligns with the state’s investment priorities for key sectors including energy evolution, high-tech manufacturing, and supply chain resilience. The State Plan specifically highlights the need for infrastructure capable of supporting advanced industries and ensuring long-term competitiveness.

Alignment With Goal 2: Workforce Prosperity

Texas’ workforce development priorities center on building a robust talent pipeline, strengthening technical training systems, and preparing residents for jobs in emerging sectors such as semiconductors, artificial intelligence, biotechnology, and clean energy. These statewide objectives directly reinforce the Coastal Bend’s goal to expand technical and vocational training aligned with regional industry needs, strengthen school to career pathways, and broaden access to training in emerging sectors.

The State Plan also emphasizes the need to maintain Texas’ global competitiveness by cultivating a highly skilled workforce that can meet the demands of rapidly evolving industries. This includes collaborations between industry, education providers, and workforce boards—an approach that mirrors the Coastal Bend’s commitment to industry driven training and regional partnerships that support workforce retention and quality-of-life investment.



Alignment With Goal 3: Resilient Economic Growth

The Coastal Bend’s goal of strengthening access to capital, supporting small businesses, and encouraging community led economic development aligns directly with the state’s Business & Industry pillar. The state plan prioritizes expanding Texas’ global competitiveness, fostering local economic development, and supporting the growth of both established and emerging industry sectors.

Texas also places strong emphasis on Innovation & Entrepreneurship, calling for increased support for startups, commercialization of research, and improved access to resources for entrepreneurs—key components of the region’s strategy to diversify the economy and strengthen partnerships with universities and technology organizations.

Additionally, the State Plan recognizes that infrastructure strain, housing shortages, and uneven access to medical care are statewide barriers to economic participation, particularly in rural communities. The Coastal Bend’s attention to addressing these disparities and improving regional collaboration closely reflects the state’s focus on ensuring that economic growth reaches all regions equitably.

Alignment With Goal 4: Vibrant Communities

The Coastal Bend’s emphasis on fostering vibrant, well-planned communities, strengthening cross county collaboration, and ensuring rural inclusion aligns with the state’s overarching commitment to regional cooperation and broad-based prosperity. The State Plan underscores the importance of local and regional collaboration in achieving statewide economic objectives and promotes a unified approach to economic development across Texas communities.

The state also recognizes the economic value of cultural, tourism, and quality-of-life assets, which are highlighted as growth sectors. Texas’s strategic plan identifies hospitality, tourism, and culture as key contributors to the state economy, aligning with the Coastal Bend’s efforts to support downtown revitalization, waterfront development, and cultural preservation.

Moreover, the use of data-driven metrics—such as job creation, business growth, infrastructure investment, and population trends—is consistent with state expectations for evaluating regional and statewide economic performance.

Alignment With Goal 5: Healthy Environment

The Coastal Bend’s goal of promoting a healthy, resilient environment aligns with the state’s recognition that environmental resilience is essential to economic competitiveness. The State Plan emphasizes the importance of strengthening regional resilience, particularly in water systems, energy infrastructure, and storm preparedness—critical issues for coastal regions like the Coastal Bend.

In addition, the plan highlights the role of clean energy and environmentally responsible growth in supporting Texas’ long-term economic future. This aligns with the region’s commitments to improving air and water quality, protecting ecosystems, and reducing environmental health risks in both urban and rural communities.

The State Plan also acknowledges the unique challenges faced by rural and underserved communities, including disparities in infrastructure, environmental stressors, and disaster vulnerability—areas that the Coastal Bend directly addresses in its Healthy Environment goal.



Alignment With Regional Plans

The 2026–2031 Coastal Bend Comprehensive Economic Development Strategy (CEDS) is intentionally designed to reinforce—and be reinforced by—the region’s major resilience, water, economic, and community development plans. This alignment ensures that the CEDS functions as a unifying regional blueprint that strengthens collaboration, reduces duplication, and positions all 11 Coastal Bend counties to secure state and federal investment.

Alignment With the Regional Resilience Partnership (RRP) Strategic Plan (2022–2032)

The RRP plan, developed through a partnership between CBCOG and the Harte Research Institute, prioritizes disaster risk mitigation, technical assistance, and regional capacity building across all 11 counties. The CEDS aligns strongly with RRP’s focus on scientific support, local government partnerships, training, and targeted mitigation activities. Together, both plans advance long term regional resilience and coastal risk reduction.

Alignment With the Coastal Bend CEDS (2021–2026)

The previous CEDS emphasized resilient economic development, countywide resilience planning, regional land use inventories, and sub regional collaboration. The updated CEDS builds on this framework by expanding strategies for emerging industries, strengthening rural economies, advancing broadband and water infrastructure, and supporting unified regional identity and marketing.

Alignment With Region N (Coastal Bend) Regional Water Plan

Region N’s water planning priorities—including long term supply, drought preparedness, and infrastructure modernization—directly reinforce CEDS Goal 1: Sustainable

Infrastructure. The CEDS supports water development strategies critical for economic stability, community resilience, and future growth across Aransas, Bee, Brooks, Duval, Jim Wells, Kenedy, Kleberg, Live Oak, Nueces, Refugio, and San Patricio counties

Alignment With County Hazard Mitigation Plans

County hazard mitigation plans (e.g., Aransas, Refugio, San Patricio) identify flooding, windstorms, drought, and infrastructure vulnerabilities as top regional risks. The CEDS reinforces these priorities by integrating climate resilience, emergency preparedness, community health, and environmental quality into its goals—especially under Sustainable Infrastructure and Healthy Environment.

Alignment With Local Comprehensive Plans

Municipal plans from Corpus Christi, Rockport, Portland, Ingleside on the Bay, and others outline goals related to downtown revitalization, coastal resource protection, transportation access, and neighborhood quality. The CEDS elevates these priorities regionwide by supporting strategic growth centers, diversified housing, small business ecosystems, cultural assets, and connectivity between rural and urban communities.

Alignment With Workforce, Infrastructure, and Industry Investments

Major regional investments—including Port of Corpus Christi expansions, industrial parks, workforce training centers, and carbon capture infrastructure—support CEDS goals related to economic diversification, workforce prosperity, clean energy innovation, and long term competitiveness. The CEDS consolidates these emerging opportunities into coordinated regional strategies.

Coastal Bend Educational Attainment

EDUCATIONAL ATTAINMENT, 2024	VALUE	% OF TOTAL	U.S.	% OF TOTAL
Total Population 25 and Older	388,378	100%	230,807,303	100%
Less Than 9th Grade	26,097	6.7%	10,803,193	4.7%
9th to 12th, No Diploma	33,751	8.7%	13,189,217	5.7%
High School Graduate (incl. equiv.)	122,192	31.5%	60,094,716	26.0%
Some College, No Degree	88,993	22.9%	44,034,048	19.1%
Associate Degree	33,454	8.6%	20,322,913	8.8%
Bachelor's Degree	55,816	14.4%	49,868,171	21.6%
Graduate or Professional Degree	28,075	7.2%	32,495,045	14.1%

Source: U.S. Census Bureau, American Community Survey, latest 5-Year Estimates

The data show a community with a comparatively lower share of adults holding a bachelor's degree or higher (21.6% vs. 35.7% nationally) and a higher concentration at the lower end of attainment, with 46.9% at high school or less versus 36.4% in the U.S. This gap is driven by both a larger “less than high school” population (15.4% vs. 10.4%) and a higher share of high school–only graduates (31.5% vs. 26.0%), which together signal substantial room for foundational skill-building and secondary credential completion. Notably, “some college, no degree” is elevated (22.9% vs. 19.1%), indicating a sizable pool of near-completers who could be moved to credentials with targeted re-engagement, credit-for-prior-learning, and flexible pathways. Associate degrees are on par with national levels (8.6% vs. 8.8%), suggesting a solid base for transfer pipelines, yet the bachelor's (14.4% vs. 21.6%) and graduate/professional shares (7.2% vs. 14.1%) lag markedly, constraining access to higher-wage occupations. In workforce terms, the profile points to dual priorities: (1) adult basic education, ESL, GED, and work-based learning to lift the bottom tail and (2) degree-completion and stackable credential strategies—especially employer-aligned—to convert “some college” momentum and expand BA+ attainment.

Coastal Bend Commute Pattern

COMMUTING TO WORK, 2024	VALUE	% OF TOTAL	U.S.	% OF TOTAL
Workers 16 years and over	251,710	100%	159,114,094	100%
Car, truck, or van -- drove alone	201,059	79.9%	109,447,738	68.8%
Car, truck, or van -- carpooled	25,513	10.1%	13,569,614	8.5%
Public transportation (including taxicab)	1,993	0.8%	5,157,401	3.2%
Walked	3,919	1.6%	3,772,609	2.4%
Other means	3,573	1.4%	3,124,243	2.0%
Worked at home	15,653	6.2%	24,042,489	15.1%

Source: U.S. Census Bureau, American Community Survey, latest 5-Year Estimates

The commute pattern points to a car-dependent labor market with much higher drive-alone rates (79.9% vs. 68.8% nationally) and slightly higher carpooling (10.1% vs. 8.5%), while public transit use is very low (0.8% vs. 3.2%) and walking is lower (1.6% vs. 2.4%). The standout gap is working from home: 6.2% locally vs. 15.1% in the U.S., suggesting limited remote-work adoption. While occupational mix and employer policy play roles, the low work-from-home rate may stem in part from broadband access and reliability constraints, which can deter remote hiring and sustained telework. Together, these patterns imply higher household transportation costs, vulnerability to fuel price shocks, and roadway congestion and emissions pressures, while also signaling opportunities: (1) expand and stabilize broadband to unlock remote work and hybrid options; (2) grow vanpools and employer-sponsored ride-sharing to build on already elevated carpooling; (3) target first/last-mile, safe walking/biking connections, and demand-responsive or limited-stop transit to serve key job centers; and (4) partner with employers on compressed weeks, flexible schedules, and telework pilots to reduce peak-hour demand.



Coastal Bend Industry Outlook

Home to 586,102 residents and 348,901 jobs in 2024, the Coastal Bend remains one of Texas' most petroleum-manufacturing-intensive regional economies—with total output reaching \$98.08 billion and a GDP of approximately \$44.30 billion.

COASTAL BEND ECONOMY OVERVIEW AND INDUSTRY OUTLOOK



SOUTH TEXAS ECONOMIC DEVELOPMENT CENTER

The Coastal Bend Region of Texas consists of 11 counties: Aransas, Bee, Brooks, Duval, Jim Wells, Kenedy, Kleberg, Live Oak, Nueces, Refugio, and San Patricio. The region includes the major urban center Corpus Christi, significant agricultural and ranching operations in counties like Kleberg and Kenedy, and energy production in Duval and Jim Wells. Coastal access supports shipping, tourism, and ecological conservation, particularly in Aransas and San Patricio counties. The area also features educational institutions, industrial development, and recreational resources that contribute to its economic profile. The Coastal Bend region, home to 586,102 residents and 348,901 jobs in 2024, remains one of Texas' most petroleum-manufacturing intensive regional economies. Total regional economic output reached \$98.08 billion, while Gross Domestic Product (GDP) was approximately \$44.30 billion. The output is defined as the value of all the economic activities in the region, including all the intermediate inputs. The Gross Domestic Product (GDP) contribution, or Value Added, measures only the new value created in the production process. Thus, GDP represents the difference between the

total output related to the industries and the cost of the intermediate inputs used.

The region's general economic structure is best summarized through the lens of the NAICS 2-digit industry classification, which highlights key subsectors driving output, employment, and value added. Table 1 summarizes industry performance using the NAICS 2-digit classification system, highlighting output and value added (GDP) by major subsectors.

TOP INDUSTRIES BY OUTPUT

Production in the Coastal Bend region is highly concentrated. The top five subsectors alone account for more than 66% of all regional output, underscoring the region's specialization in energy-intensive, industrial, and logistics-oriented activities:

1. Manufacturing (NAICS 31–33) is the region's largest contributor, generating \$39.53 billion in economic output, or 40.30% of total regional output. Production is led by petroleum refining, chemical manufacturing, and fabricated metals, which are the industries central to the Coastal Bend's role in global energy and materials supply chains.
2. Real Estate and Rental and Leasing (NAICS 53) total output is at \$7.17 billion (7.31%), reflecting strong commercial and industrial property demand

from energy, logistics, and port-related activity.

3. Construction (NAICS 23) total output is \$6.43 billion (6.56%), driven by commercial and residential construction, large-scale industrial expansions, infrastructure investments, and port-related development.
4. Mining, Quarrying, and Oil & Gas Extraction (NAICS 21) total output is \$6.34 billion (6.46%), reflecting upstream production tied to Eagle

Ford, Gulf energy activity, and refinery inputs.

5. Health Care and Social Assistance (NAICS 62) total output is \$5.61 billion (5.72%), continues to expand alongside population growth and medical specialization in the region.

These industries collectively anchor the Coastal Bend’s competitive identity and account for most of the economic output.

Table 1. The Coastal Bend Region: 2024 Industry Output And GDP Outlook

TOTAL OUTPUT (\$ BILLIONS)	\$98.08
GROSS DOMESTIC PRODUCT (GDP IN \$ BILLIONS)	\$44.30
EMPLOYMENT	348,901

#	NAICS 2-DIGIT CODE - INDUSTRY	OUTPUT (SHARE %)	GDP (SHARE %)
1	31-33 – Manufacturing	\$39.53B (40.30%)	\$10.04B (22.66%)
2	53 – Real Estate and Rental and Leasing	\$7.17 (7.31%)	\$4.69 (10.60%)
3	23 – Construction	\$6.43 (6.56%)	\$3.32 (7.50%)
4	21 – Mining, Quarrying, and Oil & Gas Extraction	\$6.34 (6.46%)	\$3.67 (8.28%)
5	62 – Health Care and Social Assistance	\$5.61 (5.72%)	\$3.31 (7.47%)
6	9B – Administrative Government	\$4.69 (4.79%)	\$4.69 (10.60%)
7	42 – Wholesale Trade	\$3.58 (3.65%)	\$2.16 (4.87%)
8	54 – Professional, Scientific, and Technical Services	\$3.49 (3.55%)	\$1.99 (4.48%)
9	44-45 – Retail Trade	\$3.44 (3.51%)	\$2.55 (5.76%)
10	72 – Accommodation and Food Services	\$3.37 (3.44%)	\$1.61 (3.64%)
11	52 – Finance and Insurance	\$3.15 (3.21%)	\$1.11 (2.51%)
12	56 – Administrative and Support and Waste Management and Remediation Services	\$1.97 (2.01%)	\$0.99 (2.24%)
13	22 – Utilities	\$1.82 (1.85%)	\$0.75 (1.68%)
14	48-49 – Transportation and Warehousing	\$1.77 (1.80%)	\$0.66 (1.48%)
15	81 – Other Services (except Public Administration)	\$1.56 (1.59%)	\$0.91 (2.05%)
16	9A – Government Enterprises	\$1.22 (1.24%)	\$0.43 (0.97%)
17	51 – Information	\$1.16 (1.18%)	\$0.51 (1.15%)
18	11 – Agriculture, Forestry, Fishing and Hunting	\$0.72 (0.73%)	\$0.38 (0.85%)
19	55 – Management of Companies and Enterprises	\$0.52 (0.53%)	\$0.28 (0.63%)
20	71 – Arts, Entertainment, and Recreation	\$0.38 (0.39%)	\$0.17 (0.39%)
21	61 – Educational Services	\$0.18 (0.19%)	\$0.09 (0.20%)
	TOTAL	\$98.08B (100.00%)	\$44.30B (100.00%)

GROSS DOMESTIC PRODUCT (GDP) CONTRIBUTION AND VALUE CREATION

The structure of GDP shows a slightly more balanced pattern than output. While petrochemical manufacturing dominates GDP creation (22.66%), several service-oriented industries, particularly real estate (10.60%), oil and gas extraction (8.28%), health care (7.47%), and administrative government (10.60%), play relatively larger role in value creation.

Mid-sized contributors to regional GDP include Wholesale Trade (4.87%), Professional and Technical Services (4.48%),

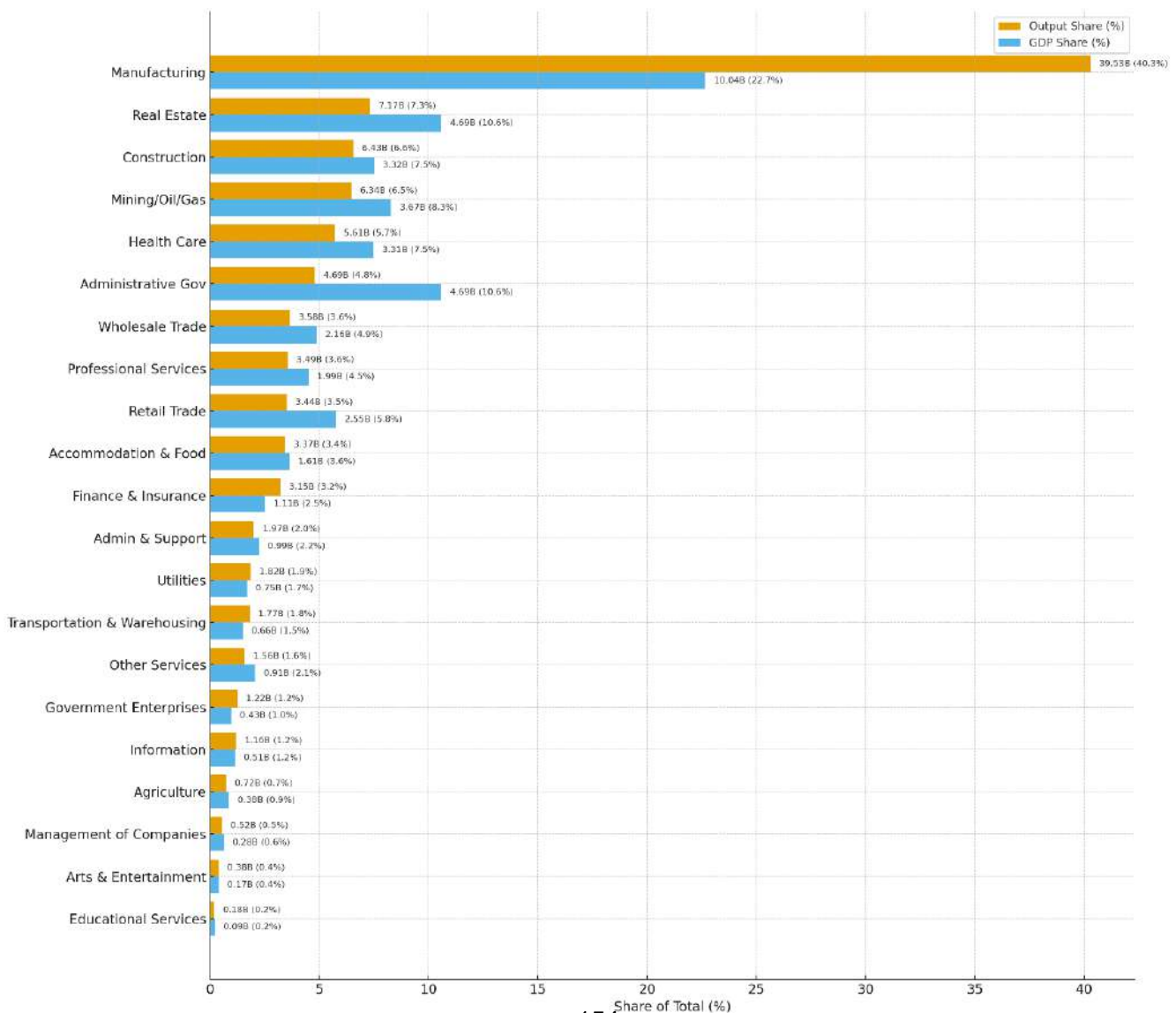
Retail Trade (5.76%), and Accommodation and Food Services (3.64%). These sectors reflect the region’s diversified demand base and the importance of supportive industries that serve both residents and the industrial core.

ALIGNMENT WITH TEXAS TARGET INDUSTRY CLUSTERS

When we focus on the Texas Governor’s Office Target Industry Clusters, the Coastal Bend region aligns strongly with several of the state’s priority growth sectors:

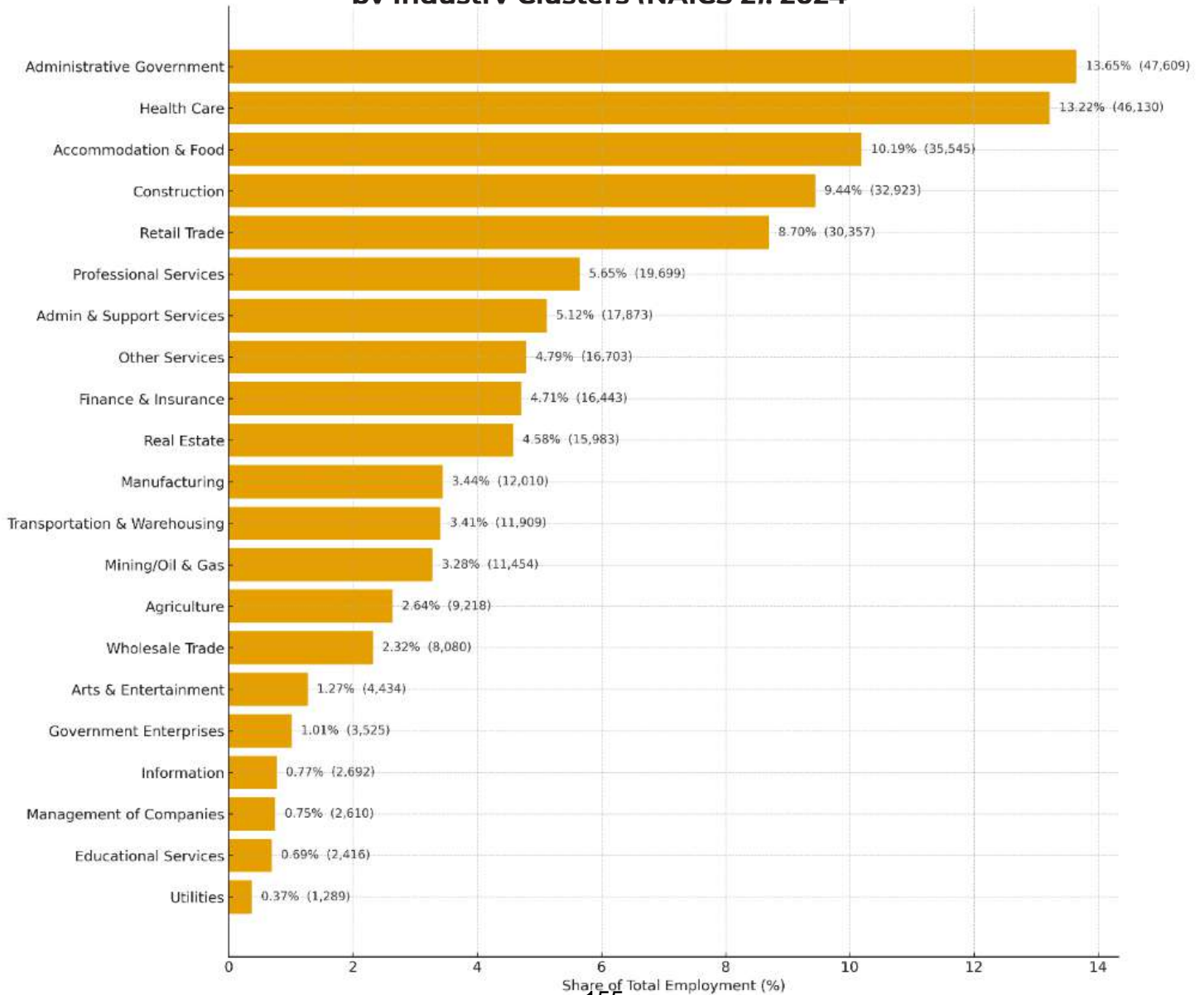
1. Energy (Oil & Gas, Chemicals, Advanced Materials): Directly tied to Manufacturing (31-33) and Mining/Oil & Gas (21). The Coastal Bend

Figure 1. Coastal Bend Output and GDP distribution by Industry Clusters (NAICS 2), 2024



- is one of Texas' leading hubs for refining, petrochemicals, LNG, and energy exports.
- 2. Advanced Manufacturing: Supported by strong activity in refining, chemicals, fabricated metals, plastics, machinery, and transportation equipment.
- 3. Aerospace, Aviation & Defense: Port and logistics infrastructure, foreign trade zones, and industrial fabrication support related supply chains and future opportunities.
- 4. Biotechnology & Life Sciences: Anchored by the region's expanding health care sector (62) and biomedical specializations.
- 5. Logistics & Distribution: With Transportation & Warehousing (48-49) and Wholesale Trade (42) contributing heavily to output and employment, the region is central to Texas' freight movement, maritime trade, and export corridors.
- 6. Corporate Services & Professional Services: Professional, Scientific, and Technical Services (54) and Management of Companies (55) continue to expand as industry support functions grow.

Figure 2. Coastal Bend Employment Distribution by Industry Clusters (NAICS 2). 2024





EMPLOYMENT DYNAMICS

Comparing Figures 1 and 2, we see that employment in the Coastal Bend shows a more balanced distribution across industries compared with output or GDP. While manufacturing and energy dominate regional production, the largest employers are service-oriented industries that support the region’s population and government operations.

The top employment sectors are:

- Administrative Government (9B) with 47,609 jobs (13.65%) reflects the region’s role as an administrative and public-service hub.
- Health Care and Social Assistance (62) with 46,130 jobs (13.22%), driven by major hospital systems, specialty care, and moderate regional population growth.
- Accommodation and Food Services (72) with 35,545 jobs (10.19%), supporting a strong tourism, hospitality, and coastal recreation economy.
- Construction (23) with 32,923 jobs (9.44%), reinforced by industrial expansion, port infrastructure, and residential growth.
- Retail Trade (44–45) with 30,357 jobs (8.70%), due to the sustained employment base supporting regional consumer activity.

Manufacturing sector (31–33), which produces 40.3% of all output, employs only 12,010 workers (3.44%), underscoring

the highly capital-intensive and high-productivity nature of the region’s petrochemical manufacturing industrial workforce.

Sectors such as transportation and warehousing (3.41%), professional and scientific services (5.65%), finance and insurance (4.71%), and wholesale trade (2.32%) also play important supporting roles in the broader industrial ecosystem anchored by refining, petrochemicals, port logistics, and construction activity.

Overall, the employment base reveals a diversified service economy surrounding a high-output industrial core, a structure strongly aligned with Texas’ long-term economic development strategy.





Urban And Rural Coastal Bend Economy Overview And Industry Outlook

A STRUCTURAL COMPARISON OF OUTPUT, GDP, AND EMPLOYMENT ACROSS THE COASTAL BEND

To understand internal variation within the Coastal Bend economy, this analysis separates the region into the Urban Coastal Bend, which consists of Nueces, San Patricio, and Aransas Counties, and the Rural Coastal Bend, consisting of the remaining eight counties. This classification follows the 2023 USDA Rural-Urban Continuum Codes, which classify these three as metropolitan counties (RUCC 1-3) and the remaining counties as non-metro (RUCC 4-9). This framework provides a consistent basis for evaluating differences in industrial structure, value creation, and labor dynamics. Table 2 summarizes the Urban-Rural distribution of output and GDP, while Figure 3 highlights differences in employment composition.

URBAN COASTAL BEND ECONOMIC STRUCTURE

The Urban Coastal Bend accounts for the vast majority of regional economic activity, generating \$83.96 billion in output (85.6% of the region) and \$37.34 billion in GDP (84.3%), as shown in Table 2. The economic base is highly concentrated in capital-intensive, energy-linked industries supported by a diversified set of service sectors.

Manufacturing dominates urban output, producing \$36.12 billion (43.02%), driven by refining, petrochemicals, chemicals, and fabricated metals, an industrial footprint centered

around the Port of Corpus Christi and large-scale pipeline, storage, and downstream operations. Real estate contributes \$5.87 billion (7.00%), reflecting strong industrial, residential and commercial demand, while construction (\$5.85 billion; 6.97%) and mining/oil & gas extraction (\$4.26 billion; 5.08%) further reinforce the region's industrial profile. Health care adds \$4.76 billion (5.67%), consistent with the concentration of major hospital systems and specialized care facilities.

Urban Gross Domestic Product (GDP) or value added presents a more balanced distribution. While manufacturing still contributes \$9.26 billion (24.81%), significant value added is also generated by real estate (10.39%), administrative government (9.20%), health care (7.64%), and retail trade (5.55%). These service sectors, although smaller in output, play an essential role in sustaining regional economic activity.

Employment patterns, illustrated in Figure 3, show that the urban labor market is not driven by heavy industry but by population- and service-oriented sectors. Administrative government represents 12.43% of all urban jobs, health care accounts for 12.83%, construction for 10.58%, and retail and accommodation/food services together for more than 19% of the urban workforce. Meanwhile, manufacturing, despite producing more than 43% of all urban output, employs only 3.71% of the urban workforce.



RURAL COASTAL BEND ECONOMIC STRUCTURE

While the Rural Coastal Bend generates \$14.12 billion in output (14.4% of the region) and \$6.96 billion in GDP (15.7%), these counties play an essential upstream role in the Coastal Bend economy—providing land, energy, natural resources, and labor to support industrial operations concentrated in the urban core. Rural production is shaped by energy extraction, agriculture, public-sector services, and local commerce.

Rural output is more evenly distributed across sectors than in urban counties. Petrochemical and other manufacturing is the largest sector, yielding \$3.41 billion output (24.12% share of total rural output).

Mining/oil & gas extraction is the second largest contributor, generating \$2.07 billion (14.69%), followed by real estate (\$1.29 billion; 9.17%), administrative government (\$1.26 billion; 8.92%), healthcare (\$0.84 billion; 5.98%), retail trade (\$0.66 billion; 4.69%), and accommodation/food services and construction (each roughly \$0.58 billion; 4.10%). These industries form the core of local economies that serve residents, support agriculture and natural-resource activity, and sustain rural labor markets.

Rural GDP further demonstrates the importance of public-sector and natural-resource activities: administrative government contributes 18.08%, mining/oil & gas extraction 16.67%, real estate 11.68%, and retail and health care together over 13%. In contrast to the industrial concentration seen in urban counties, rural value creation is more dispersed across governmental services, energy extraction, and community-serving industries.

Employment in rural counties reflects this economic mix. Agriculture accounts for 8.36% of rural jobs, compared with about 1% in urban areas. Mining and oil/gas extraction represents 6.83% of rural employment, a much higher share than in urban counties. Public administration also plays a larger role on a per-capita basis, and rural service industries such as retail, accommodation, education, and health care provide the backbone of local job markets. As Figure 3 illustrates, rural employment is more aligned with land-dependent and resource-based activities, forming a workforce ecosystem that complements the industrial and service demands of the urban core.

KEY DIFFERENCES IN URBAN-RURAL STRUCTURE

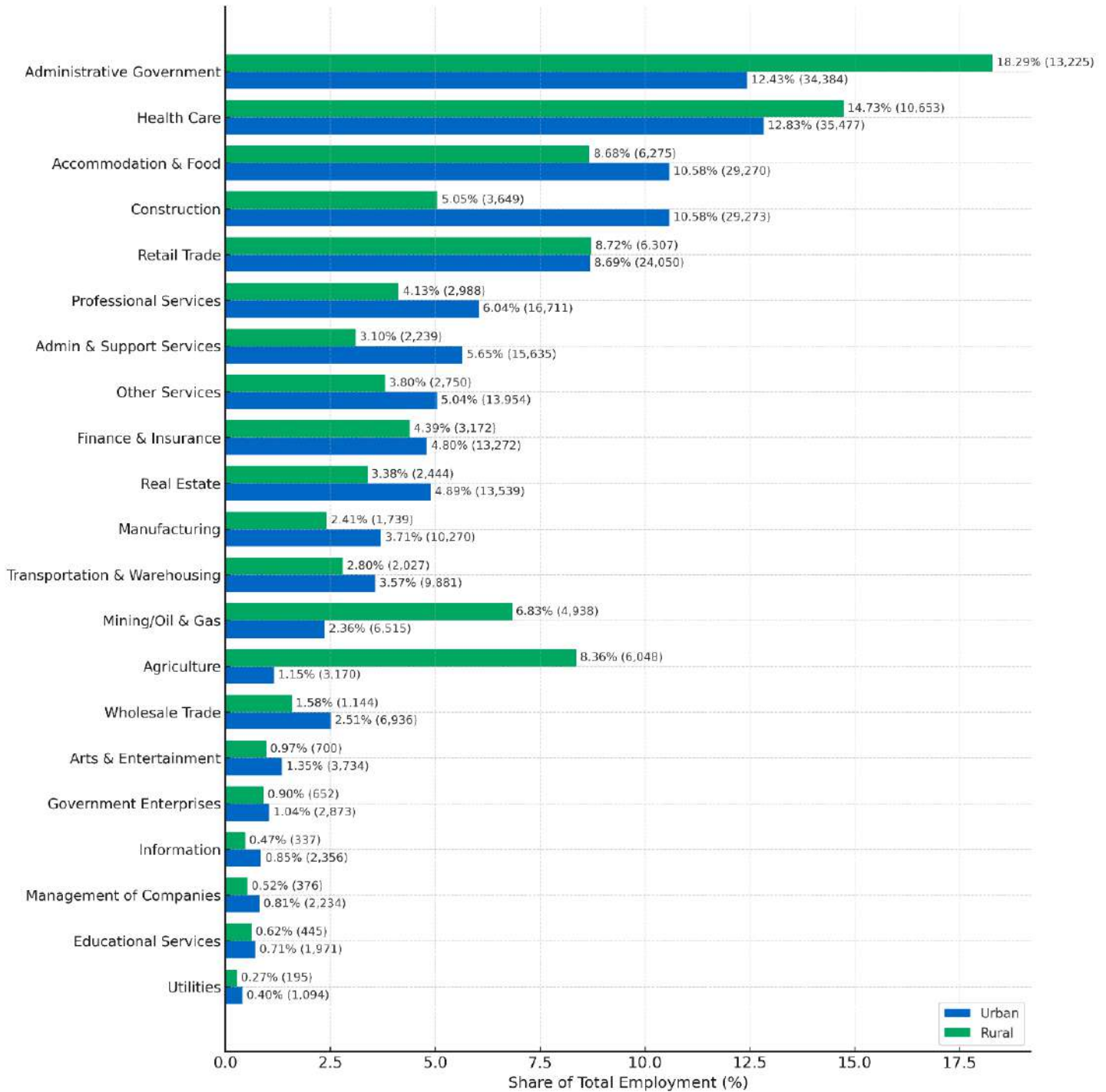
Several themes emerge from the Urban-Rural comparison:

1. Economic Concentration: Urban counties produce more than 85% of total output, driven by manufacturing and port-connected industries.
2. Value Creation Patterns: Urban GDP is more diversified than urban output, while rural GDP is more evenly distributed, with meaningful contributions from government and resource extraction.
4. Labor Market Divergence: Urban employment is dominated by government, health care, retail, hospitality, and construction, whereas rural employment is more concentrated in agriculture, oil and gas extraction, and public-sector services.
6. Complementary Economic Roles: Urban counties serve as the industrial and service hub, while rural counties provide natural resources, land-intensive production, and upstream labor, forming an integrated regional economic system.

Table 2. Urban And Rural Coastal Bend In 2024: Industry Output Outlook

		URBAN	RURAL	TOTAL	
Total Output (\$ Billions)		\$83.96	\$14.12	\$98.08	
Gross Domestic Product (Gdp In \$ Billions)		\$37.34	\$6.96	\$44.30	
Employment		276,599	72,302	348,901	
		URBAN		RURAL	
#	NAICS 2-DIGIT CODE - INDUSTRY	OUTPUT (SHARE%)	GDP (SHARE%)	OUTPUT (SHARE%)	GDP (SHARE%)
1	31-33 – Manufacturing	\$36.12B (43.02%)	\$9.26 (24.81%)	\$3.41 (24.12%)	\$0.77 (11.11%)
2	53 – Real Estate and Rental and Leasing	\$5.87 (7.00%)	\$3.88 (10.39%)	\$1.29 (9.17%)	\$0.81 (11.68%)
3	23 – Construction	\$5.85 (6.97%)	\$3.08 (8.26%)	\$0.58 (4.10%)	\$0.24 (3.42%)
4	21 – Mining, Quarrying, and Oil and Gas Extraction	\$4.26 (5.08%)	\$2.51 (6.72%)	\$2.07 (14.69%)	\$1.16 (16.67%)
5	62 – Health Care and Social Assistance	\$4.76 (5.67%)	\$2.85 (7.64%)	\$0.84 (5.98%)	\$0.46 (6.61%)
6	9B – Administrative Government	\$3.44 (4.09%)	\$3.44 (9.20%)	\$1.26 (8.92%)	\$1.26 (18.08%)
7	42 – Wholesale Trade	\$3.11 (3.71%)	\$1.87 (5.01%)	\$0.47 (3.30%)	\$0.29 (4.11%)
8	54 – Professional, Scientific, and Technical Services	\$3.01 (3.59%)	\$1.78 (4.77%)	\$0.47 (3.35%)	\$0.21 (2.97%)
9	44-45 – Retail Trade	\$2.78 (3.31%)	\$2.07 (5.55%)	\$0.66 (4.69%)	\$0.48 (6.84%)
10	72 – Accommodation and Food Services	\$2.79 (3.33%)	\$1.36 (3.65%)	\$0.58 (4.10%)	\$0.25 (3.60%)
11	52 – Finance and Insurance	\$2.58 (3.07%)	\$0.96 (2.56%)	\$0.57 (4.05%)	\$0.15 (2.22%)
12	56 – Administrative and Support and Waste Management and Remediation Services	\$1.75 (2.09%)	\$0.89 (2.39%)	\$0.22 (1.55%)	\$0.10 (1.42%)
13	22 – Utilities	\$1.59 (1.89%)	\$0.64 (1.71%)	\$0.23 (1.65%)	\$0.11 (1.56%)
14	48-49 – Transportation and Warehousing	\$1.48 (1.77%)	\$0.56 (1.51%)	\$0.28 (2.01%)	\$0.10 (1.38%)
15	81 – Other Services (except Public Administration)	\$1.31 (1.55%)	\$0.76 (2.04%)	\$0.25 (1.80%)	\$0.15 (2.10%)
16	9A – Government Enterprises	\$1.01 (1.21%)	\$0.36 (0.96%)	\$0.20 (1.44%)	\$0.07 (1.05%)
17	51 – Information	\$1.00 (1.19%)	\$0.44 (1.17%)	\$0.16 (1.12%)	\$0.07 (1.05%)
18	11 – Agriculture, Forestry, Fishing and Hunting	\$0.31 (0.37%)	\$0.16 (0.43%)	\$0.41 (2.91%)	\$0.22 (3.12%)
19	55 – Management of Companies and Enterprises	\$0.46 (0.54%)	\$0.25 (0.68%)	\$0.06 (0.42%)	\$0.02 (0.36%)
20	71 – Arts, Entertainment, and Recreation	\$0.33 (0.39%)	\$0.15 (0.40%)	\$0.06 (0.40%)	\$0.03 (0.39%)
21	61 – Educational Services	\$0.15 (0.18%)	\$0.07 (0.18%)	\$0.03 (0.24%)	\$0.02 (0.27%)
TOTAL		\$83.96B (100%)	\$37.34 (100%)	\$14.12B (100%)	\$6.97B (100%)

Figure 3. Urban V. Rural Employment Distribution by Industry Clusters (NAICS 2), 2024



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