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Competitive Assessment South Miami-Dade County

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EXECUTIVE SUMMARY

The *South Miami-Dade County Competitive Assessment* provides data analytics and a supporting narrative of the region's economic strengths, opportunities, and challenges to be addressed in the subsequent economic development strategic plan. **The Competitive Assessment findings show the South Miami-Dade region has significant economic potential given the substantial growth in its worker-age population over the last two decades, presence of key advanced industry sectors, including aerospace manufacturing, and recent designation of the Homestead Air Reserve Base (HARB) and surrounds as Spaceport Territories.** The principal challenge going forward will be to generate a heightened level of economic development public and private investment activity that will elevate South Miami-Dade to the status of an economically competitive region.

Regional Context: At Home in a Dynamic Florida County

Future economic growth in South Miami-Dade will largely depend on the structure, strengths and leadership of Miami-Dade County. South Miami-Dade businesses and workers will continue to be employed, grow, and trade within the network of businesses in the greater county and South Florida economies. Small businesses, those employing 20 employees or less, especially depend on the network of businesses, services, and industries within the region for growth and expansion.

Miami-Dade County's economic strengths provide continued opportunities for South Miami-Dade. Miami-Dade County is a highly competitive economy in a range of industry sectors, including healthcare, education, transportation, and tourism and hospitality. The distinguishing characteristics of Miami-Dade County's economy include:

- ***Economic Scope*** - Miami-Dade County has the largest and most diversified economy in the State of Florida with a gross domestic product (GDP) of over \$219 billion, an estimated 123,830 employer business establishments and 1,525,512 employer and self-employed jobs;
- ***A Diversified Industry Structure*** - In addition to healthcare, education, transportation, and leisure and hospitality, Miami-Dade County is home to growing technology sectors and employment in a wide range of high-end professional services, financial services, construction services and support, and manufacturing, especially aerospace components;
- ***Traded Industries*** - Miami-Dade County's top 10 traded industries are concentrated in industries requiring advanced education and/or professional skills, including management of companies and enterprises, legal services, management and technical consulting services, architectural and engineering services, and computer systems design and related services;
- ***Growing Presence in the Advanced Industry Sector*** - The advanced industries sector encompasses 50 industries with the highest levels of skills, knowledge, growth, and value-added productivity. Advanced industries range from manufacturing such as automotive and aerospace to high-tech services such as computer software and computer system design. Advanced industries are also deeply engrained with technology research and development (R&D) and STEM (science, technology, engineering, and math). Both Miami-Dade County and South Miami-Dade are home to a growing number of establishments and workers in the advanced industry sector with business

establishments largely found in management, scientific, and technical consulting services, architectural and engineering, and computer systems design; and

- **Foreign Trade Zone 32 & 281** – Businesses conducting operations within Foreign Trade Zones (FTZs) or subzones – granted through the Greater Miami Chamber of Commerce (FTZ 32) or PortMiami (FTZ 281) – receive various benefits, including duty and tax deferrals and reductions. These advantages provide companies with opportunities to improve cash flow and enhance competitiveness.

Combined Population and Resident Worker Growth

South Miami-Dade County has experienced rapid population growth over the past two decades. This occurred at a time when Miami-Dade County experienced slow population growth and accelerated domestic out-migration. South Miami-Dade's population increased by 7.3% (43,984 persons) since 2017, compared to 1.3% for Miami-Dade County. The abundance of South Miami-Dade's population growth since 2017 occurred in Census Designated Places (unincorporated communities). A CDP is a statistical entity comprising a densely settled concentration of population that is not within an incorporated place. In South Miami-Dade, there are 14 CDPs. CDPs such as Princeton and Naranja grew by 51.1% and 46.6%, respectively, indicating that CDPs have become the leading population growth centers in South Miami-Dade. Only Homestead (22.9%) experienced a significant population increase among municipalities.

The growth of South Miami-Dade's labor force is reflective of the region's overall population increase. South Miami-Dade's labor force increased by 13.2% (35,961 workers) during this period. The largest labor force increases occurred in the City of Homestead (36.4%), and the Naranja (78.2%), Princeton (72.4%), Goulds (56.8%), and Country Walk (31.0%) CDPs. In total, South Miami-Dade's labor force grew by 13.2% since 2017, compared to 8.4% in Miami-Dade County. South Miami-Dade's current 307,637 labor force now represents 22.7% of Miami-Dade County's total labor force.

Communities in South Miami-Dade with the highest levels of population growth since 2017 also had the most significant increases among their prime-age worker populations (25-54). Among the municipalities, Homestead had the largest increase (6,858) in their prime-age worker population, while Princeton (7,158) and Naranja (2,742) had the largest increases among CDPs.

Significantly, South Miami-Dade had a decrease in its overall populations in the 18-24 and 25-34 age groups which also occurred in Miami-Dade County. This has become a growing concern in Miami-Dade County and South Florida. The decline in younger population age groups is attributed to escalating affordability issues in South Florida.

Worker Spatial Mismatch

The *2020 Strategic Economic Development Plan for South Dade* noted the low ratio of South Miami-Dade jobs to population and the increasing number of resident workers who leave South Miami-Dade every day to travel to work. This job gap and worker commute trend began during the peak of housing bubble in early 2006. In a policy brief, *Driving on Empty: The Hidden Costs Associated with Drive 'till You Qualify*, the FIU Metropolitan Center found Miami-Dade workers further distancing themselves from their places of employment in search of more affordable housing opportunities. The Competitive Assessment found that the job gap and worker spatial mismatch has worsened over the past seven years. The current Employment Inflow/Outflow Analysis found that of the 277,498 employed residents who live in South Miami-Dade,

only 80,140 of the resident labor force, or 28.87 percent, work in South Miami-Dade. The Competitive Assessment found that while South Miami-Dade's large worker population has been a driver of economic growth in the county, South Miami-Dade has not generated a commensurate number of jobs to support its resident base. A benchmark analysis of industry job growth targeted in the 2020 plan found South Miami-Dade fell short in most industry categories including Health Care and Professional, Scientific, and Technical Services, Transportation and Warehousing (Logistics), and Manufacturing.

The Dynamics of South Miami-Dade's Economy

South Miami-Dade has a grouping of businesses that trade and grow within the network of businesses in the larger Miami-Dade County economy. According to Quarterly Census of Employment and Wages (QCEW) data, there are currently 14,761 employer establishments in South Miami-Dade that employ 152,039 workers. South Miami-Dade's leading industry sectors include Health Care (2,436 establishments), Professional, Scientific, and Technical Services (2,133 establishments), and Construction (1,542 establishments). South Miami-Dade's economic base is primarily comprised (91%) of small business establishments under 20 employees. The South Florida economy is noted for its especially high concentration and high rate of formation of small businesses relative to the national economy. Of note, however, the 234 businesses in South Miami-Dade with 100+ employees generate 62,612 jobs. South Miami-Dade's leading employment sectors include:

- Retail – 28,874 workers
- Health Care – 27,900 workers
- Accommodation and Food Services – 15,194 workers
- Construction – 11,348 workers

Miami-Dade County has a growing presence of business establishments and employees in the advanced industries sector. There is a smaller share of advanced industry employment in South Miami-Dade, though it is representative of the county. There are 1,214 advanced industry establishments in South Miami-Dade that employ 6,588 workers. The three leading advanced industry sectors in South Miami-Dade are Management, Scientific, and Technical Consulting Services (528 establishments), Architectural, Engineering (243 establishments), and Computer Systems Design and Related Services (230 establishments).

Miami-Dade's Growing Aerospace Industry

Advanced manufacturing is the use of innovative technologies to create existing products and the creation of new products. Advanced manufacturing can include production activities that depend on information, automation, computation, software, sensing, and networking. Advanced manufacturing has also been applied to traditional manufacturing like steel and automotive. Miami-Dade County's fastest growing advanced manufacturing sector is NAICS 336412: Aerospace Product and Parts. Miami-Dade's Aerospace Manufacturing industry has shown significant (161%) job growth since 2017. There are currently 94 aerospace manufacturing establishments in Miami-Dade County employing 2,884 workers.

Aerospace Product and Parts Manufacturing is one of 35 manufacturing industries outlined in the North American Industry Classification System (NAICS) that qualify as advanced. Miami-Dade County's aerospace industry is concentrated in three national industry classifications, NAICS 336412 - Aircraft

Engine and Engine Parts Manufacturing, NAICS 33613 -Other Aircraft Parts and Auxiliary Equipment Manufacturing, and NAICS 33611 - Aircraft Manufacturing.

Effective July 1, 2024, Homestead Air Reserve Base (HARB) and Miami-Dade County land north of HARB were designated as official Florida Spaceport Territories to foster aerospace research, manufacturing, and development. A Spaceport Territory is an aerospace hub that creates an ecosystem for companies to be centralized in one area with access to resources, shared ideas, a talented workforce, premium locations, and capital. Spaceport Territory designation provides economic incentives for aerospace companies to locate in South Miami-Dade.

Designation of the Spaceport Territory builds on the work of the South Dade Aerospace Technology Zone (SDAZ) Consortium. The SDAZ is comprised of the Economic Development Council of South Miami-Dade (EDC), South Florida Defense Alliance, and Florida International University's Jorge M. Pérez Metropolitan Center (JPMC).

I INTRODUCTION

A. Overview

The *2026 Competitive Assessment of South Miami-Dade County* is the first of two documents that will provide an update to the Economic Development Council (EDC) of South Miami Dade's *2020 Strategic Economic Development Plan for South-Dade*. As highlighted in the 2020 plan, the sheer economic, demographic, and cultural diversity of South Miami-Dade creates unique challenges in the development of a unified economic development plan. Nonetheless, there is consensus that this diversity is also a key strength of the region which can be leveraged. While Hurricane Andrew devastated and completely reconfigured South Miami-Dade's physical landscape and halted economic activity in 1992, South Miami-Dade's prime working-age population has grown substantially over the past two decades and is now poised to become Miami-Dade County's core region for economic growth in the decades to come.

South Miami-Dade County today is experiencing a renewed economic vibrancy where traditional industries such as agriculture, healthcare, and trade thrive along with the emergence of a growing manufacturing sector and other key advanced industries. Space Florida's designation of the Homestead Spaceport Territories in 2024 will support aerospace commerce, innovation and investment that should propel South Miami-Dade's economy and potentially transform the industry mix of the region. However, to capitalize on these opportunities, it is imperative for local government officials, business leaders, and institutions to be equipped with the most accurate, up-to-date socioeconomic data to effectively gauge the economic state of South Miami-Dade and enable sound policy decision-making going forward. The emergence of the Economic Development Council of South Miami-Dade, Inc. (EDC) shortly after Hurricane Andrew is a testimony to resilient forces at play. Now, it is time for all those engaged in the 2020 planning process and newcomers to the region to craft an updated economic development strategic plan that will guide the growth of South Miami-Dade's economy in the coming years.

B. Competitive Assessment Process

The Competitive Assessment of South Miami-Dade provides the underpinnings for strategic planning discussions and decision-making throughout the project and ultimately will serve as the analytical platform for the EDC's *2026 Economic Development Strategic Plan*. The objective is to identify the potential economic drivers, policies and strategies that will attract private investment and enable business growth, job creation, increased tax revenues, and expanded economic opportunities for businesses and residents of South Miami-Dade County. The Competitive Assessment identifies the economic advantages and challenges of South Miami-Dade's major industries and assets including the recently designated Homestead Spaceport Territory and the advanced and targeted industries in the larger trade area that could help drive economic development investment in the future. The Competitive Assessment also relies on a robust community engagement process to gain input and guidance from community and business leaders.

C. Elements of Economic Competitiveness

The future competitiveness and economic resilience of South Miami-Dade will be largely dependent on the enhancement and growth of existing and newly established traded industry sectors. Traded industries not only bring new money into the region, but they are also the sectors that generate innovation, talent, and infrastructure investment. Traded industries are found in the advanced industry sector and often exist in industry clusters.

According to the Brookings Institution, the advanced industry sector is a cluster of important industries that concentrate in and drive many of the nation's best performing regional economies. The sector is composed of 50 industries identified at the 4-digit NAICS level, and includes manufacturing, chemicals, pharmaceuticals, advanced metals, industrial machinery, medical equipment manufacture, energy development and distribution, software design, data processing, and medical and diagnostic labs. Significantly, the advanced industry sector led the nation's economic revitalization in the post-Great Recession. The advanced industry sector builds on a region's economic strengths and provides high-skill, high-paying employment less vulnerable in economic downturns.

Smart and successful regional economies engage in continuous strategic planning to remain competitive. All communities, large and small, compete for jobs, residents, and development in an environment that never stands still. Constantly changing demographics, household structure, technologies, and economic conditions require continual monitoring and updates. The economic impacts of the COVID-19 pandemic and Great Recession provide clear evidence of this reality. The fundamentals of economic resilience and competitiveness need to be built into the subsequent economic development strategic plan and include the following guiding principles:

- *Planning for Resilient and Sustainable Long-Term Growth:* Large swings in business and housing market cycles can be especially damaging at the local level. Competitive communities support diversified employment, industry, and occupational growth that is less susceptible to business cycle fluctuations, protecting small businesses, worker incomes, and household wealth during national economic downturns;
- *Supporting Local Innovation:* All local economies grow through the expansion of local businesses and a steady supply of new businesses to maintain employment and competitive advantages. All businesses, even small ones, engage in markets that never stand still, and need to continuously innovate, invest, and update to remain competitive. Successful communities support local business capacity to innovate and adopt new technologies to improve performance;
- *Expanding Economic Opportunity and Upward Mobility:* Economically resilient communities support an expanding supply of jobs and occupations paying competitive wages and skills that provide a platform for upward economic mobility to build household wealth. In addition, competitive regions and communities implement strategies to prepare residents to compete for these opportunities;
- *Building Local Human Capital:* Resilient local economies build and improve the collective knowledge and skills of its labor force, building a local labor force with the skills, education and brainpower to support globally competitive businesses, obtain higher-wages, high-skilled employment opportunities, and adapt to rapidly changing employment markets, technology, and industry changes;
- *Targeted and Strategic Allocation of Resources to Stimulate Economic Growth:* In an era of shrinking federal and state funding, leaders in high performing regional and local economies must a) focus and target investments in their local strengths, b) take a disciplined and targeted approach to investments in physical assets, real estate, and infrastructure, and c) focus on high-

wage job creation in leading local industries before attempting to create jobs in entirely new industries;

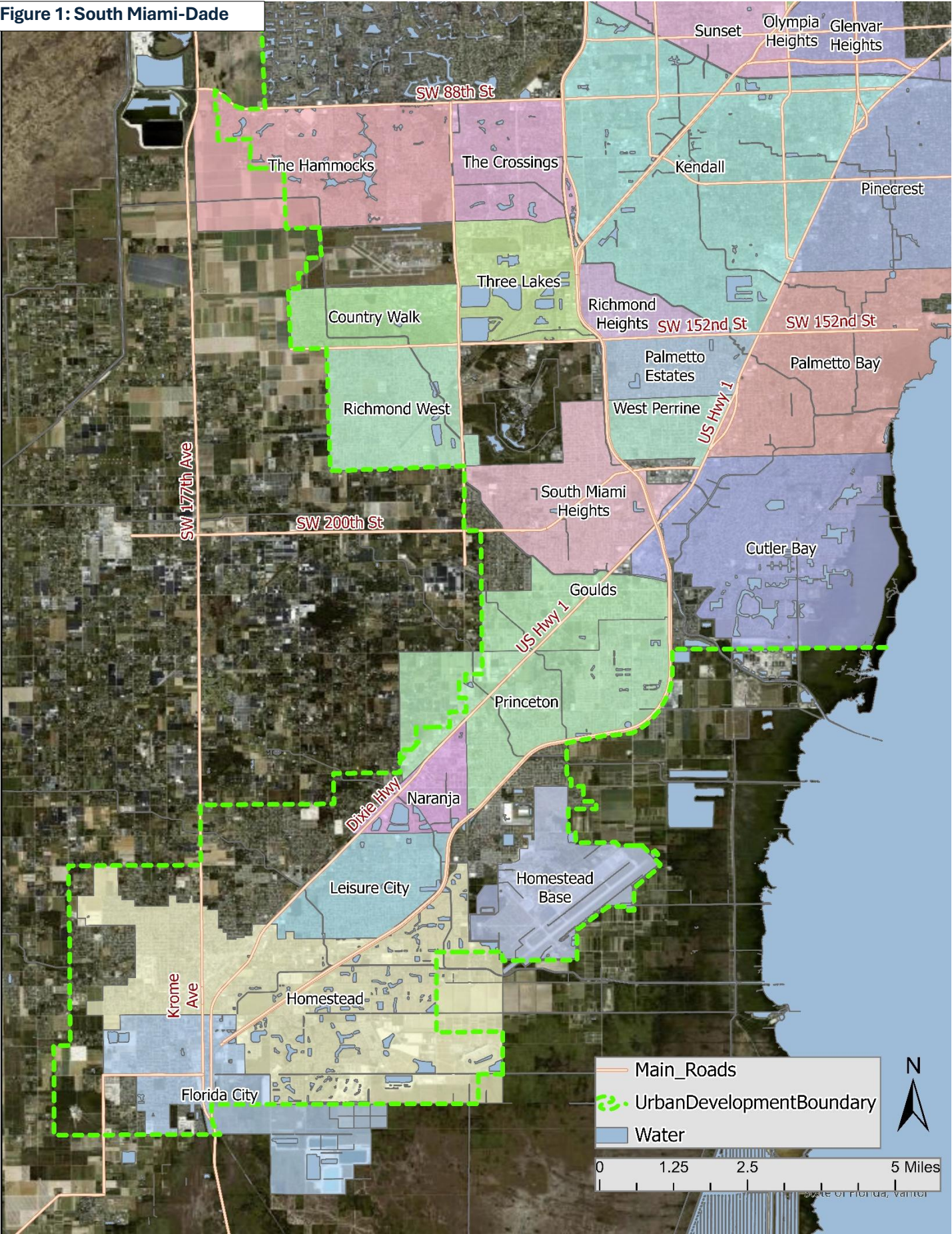
- *Strategic Quality of Life Investments*: Resilient communities make intelligent investments in quality public spaces, multi-generational recreation, and activities that further enhance the work-life balance.

D. Final Report: South Miami-Dade County Economic Development Strategic Plan

The Competitive Assessment provides the economic development planning analytics for the Economic Development Council (EDC) of South Miami-Dade's *2026 Economic Development Strategic Plan*. The strategic plan will consist of the following key elements:

- A statement of goals, objectives and strategic priorities;
- Clear statements on South Miami-Dade's economic development potential, competitive advantages, opportunities and direction for immediate and long-term growth;
- Business strategies for the region's most promising industries, occupations and new small business creation opportunities;
- A clear description of the specific needs of target businesses and industries to help guide South Miami-Dade's direction of resources, projects, programs, and incentives; and
- An economic development management element with performance metrics and marketing strategies.

Figure 1: South Miami-Dade



II ECONOMIC & DEMOGRAPHIC TRENDS

A. Population Growth

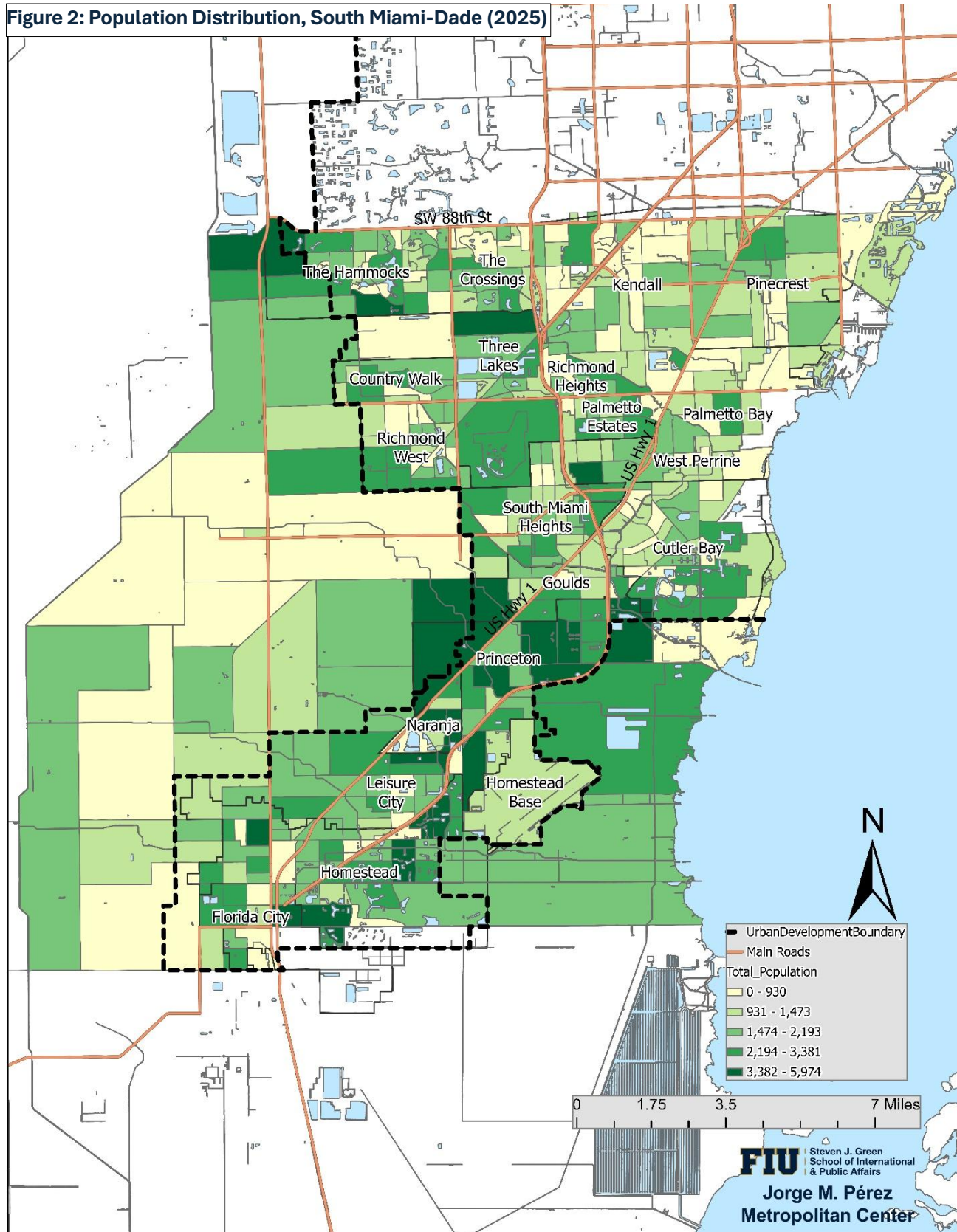
Trends in population growth (or decline) are used as a general measure of economic performance. South Miami-Dade's population has grown from 603,342 in 2017 to 647,326 in 2024 (**Table 1**) - the most recent year for which U.S. Census ACS 5-Year Estimates are available- representing a 7.3% increase. In contrast, Miami-Dade County's population grew by 1.3% during the same period, pointing to a significant population growth rate in South Miami-Dade. Specifically, most of this population growth in South Miami-Dade occurred in the City of Homestead, with 22.9% growth, and several Census Designated Places (CDPs). A CDP is an unincorporated community identified by the U.S. Census Bureau for statistical purposes. The Census Bureau treats CDPs as the statistical equivalent of a city. This way, they can ensure these places appear in population counts and data for the target population. In South Miami-Dade, there are 14 CDPs. CDPs such as Princeton and Naranja grew by 51.1% and 46.6%, respectively, indicating that CDPs have become the leading population growth centers in South Miami-Dade County. In contrast, municipalities such as Palmetto Bay and Pinecrest and CDPs such as Richmond Heights, Richmond West, and South Miami Heights have experienced modest population declines. **Figure 2** illustrates the population distribution of South Miami-Dade.

Table 1: Population Change by Municipalities and CDPs in South Miami-Dade (2017- 2024)

	Population			Labor Force Population		
	2017	2024	% Change	2017	2024	% Change
Town of Cutler Bay	44,721	45,070	0.8%	22,195	22,441	1.1%
Florida City	12,149	12,943	6.5%	3,910	4,388	12.2%
City of Homestead	67,354	82,807	22.9%	27,723	37,804	36.4%
Village of Palmetto Bay	24,679	24,639	-0.2%	11,417	12,353	8.2%
Village of Pinecrest	19,441	18,462	-5.0%	9,179	8,455	-7.9%
<i>Census Designated Places (Unincorporated)</i>						
Country Walk CDP	16,601	19,291	16.2%	7,702	10,087	31.0%
Goulds CDP	11,768	14,425	22.6%	3,944	6,184	56.8%
Kendall CDP	75,123	79,562	5.9%	38,247	39,445	3.1%
Leisure City CDP	27,389	27,808	1.5%	10,417	11,756	12.9%
Naranja CDP	10,776	15,796	46.6%	3,879	6,914	78.2%
Palmetto Estates CDP	15,998	16,129	0.8%	7,484	7,510	0.3%
Princeton CDP	28,201	42,625	51.1%	12,140	20,930	72.4%
Richmond Heights CDP	11,155	9,992	-10.4%	5,070	4,876	-3.8%
Richmond West CDP	36,898	35,593	-3.5%	18,695	17,441	-6.7%
South Miami Heights CDP	39,312	38,766	-1.4%	17,709	18,145	2.5%
The Crossings CDP	23,062	22,963	-0.4%	11,409	12,090	6.0%
The Hammocks CDP	58,976	58,838	-0.2%	30,004	30,005	0.0%
Three Lakes CDP	16,266	16,888	3.8%	8,484	9,172	8.1%
West Perrine CDP	10,634	11,162	5.0%	4,040	4,864	20.4%
Municipalities and CDPs Total	550,503	593,759	7.9%	253,648	284,860	12.3%
South Miami-Dade	603,342	647,326	7.3%	271,676	307,637	13.2%
Miami-Dade County	2,702,602	2,738,356	1.3%	1,251,193	1,356,445	8.4%

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

Figure 2: Population Distribution, South Miami-Dade (2025)



Source: ACS 5 Year Estimates 2017, 2024 ; TIGER Shapefiles 2024

B. Labor Force

The primary purpose of labor market analysis is to provide insights into current and future workforce needs, helping businesses, organizations, and policymakers make informed decisions about industry employment, training, and economic development strategies. Labor force and employment data also provide important information on the size and stability of a local economy as measured by the local workforce. Trends developed from this data can help new and existing businesses understand the strengths, weaknesses, and predictability of the area economy. Labor force participation rates (LFPRs) measure the number of citizens employed or looking for employment as a percentage of the civilian non-institutional population. LFPR data can also help determine the factors that lead to discouraged workers, or workers that have dropped out of the labor force.

The growth in South Miami-Dade's labor force is reflective of larger population increases since 2017. The largest labor force increases occurred in the City of Homestead (36.4%), and the Naranja (78.2%), Princeton (72.4%), Goulds (56.8%), and Country Walk (31.0%) CDPs. In total, South Miami-Dade's labor force grew by 13.2% since 2017 compared to 8.4% in Miami-Dade County, as a whole. South Miami-Dade's current 307,637 labor force count now represents 22.7% of Miami-Dade County's total labor force.

C. Demographic Age Structure

Many factors can impact growth in the labor market and the LFPR, including economic and demographic trends. In fact, demographics can help explain the general decline in national LFPRs over the last two decades as the composition of the labor force has changed as a result of an aging workforce and a general increase in educational attainment. The labor force participation rate differs across age groups. Among all age groups, workers aged 25-54, also known as prime-age workers, have the highest labor force participation rate. They form the core of the U.S. labor force, accounting for nearly two-thirds of the total labor force.

In South Miami-Dade, communities with the highest levels of population growth since 2017 also had the most significant increases among their prime age worker populations. As **Table 2** shows, among the municipalities, Homestead had the largest increase (6,858) in their prime-age worker population, while Princeton (7,158) and Naranja (2,742) had the largest increases among CDPs.

Significantly, South Miami-Dade had a decrease in its overall populations in the 18-24 and 25-34 age groups which also occurred in Miami-Dade County, as a whole. The only municipality that increased both these younger population age groups was Homestead. The Village of Palmetto Bay had an increase in its 25-34 age group. Among the CDPs, Princeton, Naranja, and Country Walk had significant increases in the two younger age groups.

Table 2: Demographic Age Structure for South Miami-Dade (2017- 2024)

2017 Age for South Miami-Dade Cities and CDPs							2024 Age for South Miami-Dade Cities and CDPs					
	Total population	Under 18 years	18 to 24 years	25 to 54 years	55 to 64 years	65 years and over	Total population	Under 18 years	18 to 24 years	25 to 54 years	55 to 64 years	65 years and over
Town of Cutler Bay	44,721	11,397	3,676	19,374	5,141	5,133	45,070	10,097	3,618	17,999	5,745	7,611
		25.5%	8.2%	43.3%	11.5%	11.5%		22.4%	8.0%	39.9%	12.7%	16.9%
Florida City	12,149	4,120	1,516	4,692	1,043	778	12,943	4,178	1,195	5,148	926	1,496
		33.9%	12.5%	38.6%	8.6%	6.4%		32.3%	9.2%	39.8%	7.2%	11.6%
City of Homestead	67,354	21,269	5,988	29,678	5,261	5,158	82,807	24,446	7,955	36,536	6,871	6,999
		31.6%	8.9%	44.1%	7.8%	7.7%		29.5%	9.6%	44.1%	8.3%	8.5%
Village of Palmetto Bay	24,679	6,322	2,198	9,371	3,195	3,593	24,639	5,984	1,524	9,406	3,917	3,808
		25.6%	8.9%	38.0%	12.9%	14.6%		24.3%	6.2%	38.2%	15.9%	15.5%
Village of Pinecrest	19,441	4,959	1,601	7,173	2,766	2,942	18,462	5,220	1,236	6,289	2,494	3,223
		25.5%	8.2%	36.9%	14.2%	15.1%		28.3%	6.7%	34.1%	13.5%	17.5%
Census Designated Places CDP (Unincorporated)												
Country Walk CDP	16,601	4,355	1,366	7,305	1,795	1,780	19,291	4,475	1,901	8,142	2,572	2,201
		26.2%	8.2%	44.0%	10.8%	10.7%		23.2%	9.9%	42.2%	13.3%	11.4%
Goulds CDP	11,768	3,729	1,148	4,667	1,160	1,064	14,425	3,514	1,137	5,741	1,718	2,315
		31.7%	9.8%	39.7%	9.9%	9.0%		24.4%	7.9%	39.8%	11.9%	16.0%
Homestead Base CDP	843	343	150	261	54	35	1,125	494	152	377	61	41
		40.7%	17.8%	31.0%	6.4%	4.2%		43.9%	13.5%	33.5%	5.4%	3.6%
Kendall CDP	75,123	14,129	6,111	30,812	10,621	13,450	79,562	16,797	5,161	30,124	11,070	16,410
		18.8%	8.1%	41.0%	14.1%	17.9%		21.1%	6.5%	37.9%	13.9%	20.6%
Leisure City CDP	27,389	7,531	3,024	11,713	2,535	2,586	27,808	8,128	2,898	11,253	2,802	2,727
		27.5%	11.0%	42.8%	9.3%	9.4%		29.2%	10.4%	40.5%	10.1%	9.8%
Naranja CDP	10,776	3,631	1,019	4,274	998	854	15,796	4,642	1,327	7,016	1,603	1,208
		33.7%	9.5%	39.7%	9.3%	7.9%		29.4%	8.4%	44.4%	10.1%	7.6%
	15,998	3,593	1,835	6,672	1,839	2,059	16,129	3,149	1,497	6,814	1,875	2,794

2017 Age for South Miami-Dade Cities and CDPs							2024 Age for South Miami-Dade Cities and CDPs					
	Total population	Under 18 years	18 to 24 years	25 to 54 years	55 to 64 years	65 years and over	Total population	Under 18 years	18 to 24 years	25 to 54 years	55 to 64 years	65 years and over
Palmetto Estates CDP		22.5%	11.5%	41.7%	11.5%	12.9%		19.5%	9.3%	42.2%	11.6%	17.3%
Princeton CDP	28,201	8,376	2,744	12,634	2,421	2,026	42,625	12,111	3,223	19,792	3,826	3,673
		29.7%	9.7%	44.8%	8.6%	7.2%		28.4%	7.6%	46.4%	9.0%	8.6%
Richmond Heights CDP	11,155	2,207	996	5,243	1,091	1,618	9,992	2,174	773	4,187	1,024	1,834
		19.8%	8.9%	47.0%	9.8%	14.5%		21.8%	7.7%	41.9%	10.2%	18.4%
Richmond West CDP	36,898	8,228	3,688	16,295	4,088	4,599	35,593	7,724	2,616	13,876	4,663	6,714
		22.3%	10.0%	44.2%	11.1%	12.5%		21.7%	7.3%	39.0%	13.1%	18.9%
South Miami Heights CDP	39,312	8,732	4,012	16,371	4,795	5,402	38,766	7,895	2,921	15,333	5,782	6,835
		22.2%	10.2%	41.6%	12.2%	13.7%		20.4%	7.5%	39.6%	14.9%	17.6%
The Crossings CDP	23,062	4,640	2,015	9,070	3,571	3,766	22,963	4,511	1,702	9,086	3,021	4,643
		20.1%	8.7%	39.3%	15.5%	16.3%		19.6%	7.4%	39.6%	13.2%	20.2%
The Hammocks CDP	58,976	11,717	6,533	26,593	7,068	7,065	58,838	12,162	4,277	23,976	8,235	10,188
		19.9%	11.1%	45.1%	12.0%	12.0%		20.7%	7.3%	40.7%	14.0%	17.3%
Three Lakes CDP	16,266	3,872	1,539	7,590	1,760	1,505	16,888	3,954	1,535	7,466	2,115	1,818
		23.8%	9.5%	46.7%	10.8%	9.3%		23.4%	9.1%	44.2%	12.5%	10.8%
West Perrine CDP	10,634	3,026	952	4,089	1,290	1,277	11,162	2,855	872	4,864	1,137	1,434
		28.5%	9.0%	38.5%	12.1%	12.0%		25.6%	7.8%	43.6%	10.2%	12.8%
South Miami-Dade	603,342	150,014	57,486	256,200	67,763	71,879	647,326	157,230	53,890	265,728	77,211	93,267
		24.9%	9.5%	42.5%	11.2%	11.9%		24.3%	8.3%	41.1%	11.9%	14.4%
Miami-Dade County	2,702,602	553,299	243,004	1,171,391	320,586	414,322	2,738,356	548,079	225,477	1,139,011	361,893	463,896
		20.5%	9.0%	43.3%	11.9%	15.3%		20.0%	8.2%	41.6%	13.2%	16.9%

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

D. Race and Ethnicity

The Hispanic or Latino population of South Miami-Dade has grown significantly since 2017. South Miami-Dade's Hispanic or Latinos now comprise 62.2% (445,274 persons) of the population compared to 56.9% (381,756 persons) in 2017 (**Table 3**). The percentage of South Miami-Dade's Hispanic or Latino population is now comparable (69.3%) to Miami-Dade County, as a whole.

Significantly, South Miami-Dade's White not Hispanic or Latino and Black or African American populations have decreased since 2017 which aligns with Miami-Dade County's demographic trend, as a whole. South Miami-Dade's White not Hispanic or Latino and Black or African American populations decreased by 16.4% and 9.6%, respectively, since 2017.

Table 3: Race and Ethnicity South Miami-Dade (2017- 2024)

	Total Population	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race	Total Population	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race
	2017				2024				% Change 2017-2024		
Cutler Bay Town	44,721	12,281	4,711	25,909	45,070	9,634	3,957	28,844	-21.6%	-16.0%	11.3%
		27.5%	10.5%	57.9%		21.4%	8.8%	64.0%			
Florida City	12,149	480	5,418	6,179	12,943	517	5,030	7,287	7.7%	-7.2%	17.9%
		4.0%	44.6%	50.9%		4.0%	38.9%	56.3%			
Homestead City	67,354	8,992	14,107	42,563	82,807	8,847	15,208	55,837	-1.6%	7.8%	31.2%
		13.4%	20.9%	63.2%		10.7%	18.4%	67.4%			
Palmetto Bay Village	24,679	10,634	1,368	10,805	24,639	8,945	1,059	12,594	-15.9%	-22.6%	16.6%
		43.1%	5.5%	43.8%		36.3%	4.3%	51.1%			
Pinecrest Village	19,441	8,419	119	9,113	18,462	7,481	338	8,989	-11.1%	184.0%	-1.4%
		43.3%	0.6%	46.9%		40.5%	1.8%	48.7%			
Census Designated Places (Unincorporated)											
Country Walk CDP	16,601	3,288	1,121	11,326	19,291	2,149	1,322	14,542	-34.6%	17.9%	28.4%
		19.8%	6.8%	68.2%		11.1%	6.9%	75.4%			
Goulds CDP	11,768	669	5,413	5,366	14,425	1,233	5,772	7,164	84.3%	6.6%	33.5%
		5.7%	46.0%	45.6%		8.5%	40.0%	49.7%			
Homestead Base CDP	843	131	443	260	1,125	78	624	422	-40.5%	40.9%	62.3%
		15.5%	52.6%	30.8%		6.9%	55.5%	37.5%			

	Total Population	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race	Total Population	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race	White not Hispanic or Latino	Black or African American	Hispanic or Latino of any race
	2017				2024				% Change 2017-2024		
Kendall CDP	75,123	18,735	2,437	50,242	79,562	18,363	2,465	53,609	-2.0%	1.1%	6.7%
		24.9%	3.2%	66.9%		23.1%	3.1%	67.4%			
Leisure City CDP	27,389	874	3,869	22,209	27,808	1,204	3,494	22,743	37.8%	-9.7%	2.4%
		3.2%	14.1%	81.1%		4.3%	12.6%	81.8%			
Naranja CDP	10,776	501	3,800	6,058	15,796	1,288	3,594	10,702	157.1%	-5.4%	76.7%
		4.6%	35.3%	56.2%		8.2%	22.8%	67.8%			
Palmetto Estates CDP	15,998	1,410	5,415	8,088	16,129	938	5,202	9,340	-33.5%	-3.9%	15.5%
		8.8%	33.8%	50.6%		5.8%	32.3%	57.9%			
Princeton CDP	28,201	3,015	5,900	18,602	42,625	3,897	6,310	31,038	29.3%	6.9%	66.9%
		10.7%	20.9%	66.0%		9.1%	14.8%	72.8%			
Richmond Heights CDP	11,155	571	6,932	3,494	9,992	382	3,597	5,645	-33.1%	-48.1%	61.6%
		5.1%	62.1%	31.3%		3.8%	36.0%	56.5%			
Richmond West CDP	36,898	5,341	2,283	27,837	35,593	2,757	2,183	28,851	-48.4%	-4.4%	3.6%
		14.5%	6.2%	75.4%		7.7%	6.1%	81.1%			
South Miami Heights CDP	39,312	3,393	6,756	28,240	38,766	1,652	6,311	29,272	-51.3%	-6.6%	3.7%
		8.6%	17.2%	71.8%		4.3%	16.3%	75.5%			
The Crossings CDP	23,062	5,982	860	15,173	22,963	5,041	470	16,464	-15.7%	-45.3%	8.5%
		25.9%	3.7%	65.8%		22.0%	2.0%	71.7%			
The Hammocks CDP	58,976	8,199	1,779	46,540	58,838	6,942	2,415	46,699	-15.3%	35.8%	0.3%
		13.9%	3.0%	78.9%		11.8%	4.1%	79.4%			
Three Lakes CDP	16,266	3,808	1,596	10,033	16,888	3,213	940	10,682	-15.6%	-41.1%	6.5%
		23.4%	9.8%	61.7%		19.0%	5.6%	63.3%			
West Perrine CDP	10,634	951	5,785	3,640	11,162	312	4,174	6,348	-67.2%	-27.8%	74.4%
		8.9%	54.4%	34.2%		2.8%	37.4%	56.9%			
South Miami-Dade	603,342	109,767	88,898	381,756	647,326	91,781	80,356	445,274	-16.4%	-9.6%	16.6%
		18.2%	14.7%	63.3%		14.2%	12.4%	68.8%			
Miami-Dade County	2,702,602	371,233	441,604	1,823,038	2,738,356	344,354	384,902	1,898,211	-7.2%	-12.8%	4.1%
		13.7%	16.3%	67.5%		12.6%	14.1%	69.3%			

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

E. Educational Attainment

Educational attainment is an important economic development indicator. Educational attainment can raise an individual's productivity and creativity and promote entrepreneurship and technological advances. A local economy's ability to stay competitive depends on the flexibility of the labor force to adapt to changes in job opportunities and investing in the education and training necessary to meet new demands. In fact, the most important economic development factor in the knowledge economy and its current focus on innovation is the quality and availability of the workforce. Educational achievement and attainment are important aspects of labor force quality.

South Miami-Dade's educational attainment has improved significantly. According to the U.S. Census, American Community Survey, South Miami-Dade's population 25 years and older with a bachelor's degree or higher increased by 23.1% since 2017. Notably, the population 25 years and older with a high school diploma has increased by 12.7% (**Table 4**).

All five municipalities and most CDPs have seen an increase in the percentage of their population 25 years and over with a bachelor's degree or higher. Among the municipalities, the largest increases were in Florida City (126.9%) and Homestead (51.5%). Among the CDPs, the highest increases were in Naranja (115.3%), Princeton (105.8%), and Goulds (48.4%).

Table 4: Educational Attainment by Municipalities and CDPs in South Miami-Dade (2017- 2024)

	2017			2024			% Change 2017-2024	
	Population 25 years and over	High school graduate or higher	Bachelor's degree or higher	Population 25 years and over	High school graduate or higher	Bachelor's degree or higher	High school graduate or higher	Bachelor's degree or higher
Town of Cutler Bay	29,648	26,416	9,398	31,355	27,540	10,660	4.3%	13.4%
		89.10%	31.70%		87.80%	34.00%		
Florida City	6,513	3,263	378	7,570	5,421	857	66.1%	126.9%
		50.10%	5.80%		71.60%	11.30%		
City of Homestead	40,097	29,592	8,300	50,406	38,793	12,575	31.1%	51.5%
		73.80%	20.70%		77.00%	24.90%		
Village of Palmetto Bay	16,159	15,319	8,694	17,131	15,921	10,300	3.9%	18.5%
		94.80%	53.80%		92.90%	60.10%		
Village of Pinecrest	12,881	12,288	7,935	12,006	11,791	8,693	-4.0%	9.6%
		95.40%	61.60%		98.20%	72.40%		
Census Designated Places CDP (Unincorporated)								
Country Walk CDP	10,880	10,031	3,438	12,915	12,080	4,754	20.4%	38.3%
		92.20%	31.60%		93.50%	36.80%		
Goulds CDP	6,891	5,478	1,006	9,774	7,665	1,493	39.9%	48.4%
		79.50%	14.60%		78.40%	15.30%		
Homestead Base CDP	350	237	-	479	289	57	22.0%	--
		67.70%	0.00%		60.30%	11.90%		
Kendall CDP	54,883	50,437	24,588	57,604	53,853	27,570	6.8%	12.1%
		91.90%	44.80%		93.50%	47.90%		

	2017			2024			% Change 2017-2024	
	Population 25 years and over	High school graduate or higher	Bachelor's degree or higher	Population 25 years and over	High school graduate or higher	Bachelor's degree or higher	High school graduate or higher	Bachelor's degree or higher
Leisure City CDP	16,834	10,437	1,734	16,782	11,045	1,705	5.8%	-1.7%
		62.00%	10.30%		65.80%	10.20%		
Naranja CDP	6,126	4,527	925	9,827	7,695	1,992	70.0%	115.3%
		73.90%	15.10%		78.30%	20.30%		
Palmetto Estates CDP	10,570	8,646	1,977	11,483	9,607	2,886	11.1%	46.0%
		81.80%	18.70%		83.70%	25.10%		
Princeton CDP	17,081	13,733	3,707	27,291	23,861	7,629	73.7%	105.8%
		80.40%	21.70%		87.40%	28.00%		
Richmond Heights CDP	7,952	6,823	1,328	7,045	5,969	1,688	-12.5%	27.1%
		85.80%	16.70%		84.70%	24.00%		
Richmond West CDP	24,982	21,410	6,995	25,253	22,206	8,324	3.7%	19.0%
		85.70%	28.00%		87.90%	33.00%		
South Miami Heights CDP	26,568	19,793	4,331	27,950	22,795	5,467	15.2%	26.2%
		74.50%	16.30%		81.60%	19.60%		
The Crossings CDP	16,407	15,308	5,808	16,750	15,661	7,154	2.3%	23.2%
		93.30%	35.40%		93.50%	42.70%		
The Hammocks CDP	40,726	36,938	13,440	42,399	37,987	16,061	2.8%	19.5%
		90.70%	33.00%		89.60%	37.90%		
Three Lakes CDP	10,855	9,943	4,223	11,399	10,382	4,364	4.4%	3.3%
		91.60%	38.90%		91.10%	38.30%		
West Perrine CDP	6,656	5,425	1,278	7,435	6,457	1,554	19.0%	21.6%
		81.50%	19.20%		86.80%	20.90%		
South Miami- Dade	395,842	329,728	114,628	436,206	371,732	141,052	12.7%	23.1%
		83.3%	29.0%		85.2%	32.3%		
Miami-Dade County	1,906,299	1,543,966	530,196	1,964,800	1,649,424	675,665	6.8%	27.4%
		81.0%	34.3%		83.9%	34.4%		

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

F. Household Income

According to the 2024 ACS, the median household income in South Miami-Dade is \$83,281 compared to \$71,753 for Miami-Dade County, as a whole (**Table 5**). Median household incomes vary significantly in South Miami-Dade ranging from a low of \$47,482 in Florida City to \$206,417 in Village of Pinecrest. Among the CDPs, median household incomes range from a low of \$41,977 in Leisure City to a high of \$124,540 in Country Walk.

Among the municipalities, Homestead had the highest percentage increase (51.6%) in its median household income since 2017. Several CDPs had significant increase in their median household incomes including Goulds (79.8%), Naranja (66.5%), Princeton (65.3%), West Perrine (65.3%), Country Walk (64.8%), and South Miami Heights (64.3%).

Table 5: Household income by Municipalities and CDPs in South Miami-Dade (2017- 2024)

	Median Household Income		
	2017	2024	% Change
Town of Cutler Bay	\$70,473	\$89,244	26.6%
Florida City	\$34,545	\$47,482	37.4%
City of Homestead	\$43,150	\$65,423	51.6%
Village of Palmetto Bay	\$107,612	\$142,447	32.4%
Village of Pinecrest	\$152,643	\$206,417	35.2%
<i>Census Designated Places (Unincorporated)</i>			
Country Walk CDP	\$75,550	\$124,540	64.8%
Goulds CDP	\$34,344	\$61,735	79.8%
Homestead Base CDP	\$11,824	\$7,969	-32.6%
Kendall CDP	\$69,277	\$87,325	26.1%
Leisure City CDP	\$32,770	\$41,977	28.1%
Naranja CDP	\$32,432	\$53,984	66.5%
Palmetto Estates CDP	\$54,390	\$82,064	50.9%
Princeton CDP	\$50,483	\$83,426	65.3%
Richmond Heights CDP	\$47,223	\$67,606	43.2%
Richmond West CDP	\$74,284	\$101,970	37.3%
South Miami Heights CDP	\$39,825	\$65,417	64.3%
The Crossings CDP	\$68,824	\$91,012	32.2%
The Hammocks CDP	\$65,211	\$85,628	31.3%
Three Lakes CDP	\$65,000	\$102,306	57.4%
West Perrine CDP	\$40,528	\$66,997	65.3%
South Miami-Dade	\$60,865	\$83,281	36.8%
Miami-Dade County	\$46,338	\$71,753	54.8%

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates; *Median Household Income for South Miami-Dade is computed using a weighted median income approach*

G. Occupations and Wages

As previously noted, South Miami-Dade’s population age 16 and over in the labor force increased by 13.2% since 2017. A current analysis by occupational codes found significant employment changes since 2017. Occupational codes are standardized numerical labels used to categorize and organize jobs according to their responsibilities, required skills, education, and training. Systems such as the Standard Occupational Classification (SOC) assign these codes, allowing federal agencies to consistently collect and analyze labor market data across different industries and regions.

As shown in **Table 6**, in South Miami-Dade County, the most significant growth occurred among several SOC’s including management (70%), legal (49%), and business and financial occupations (43%). Notably, there was growth in most occupation codes and specifically those with the highest median hourly and annual earnings.

Table 6: Jobs and Wages by Occupation, South Miami-Dade (2017-2025)

SOC	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Median Hourly Earnings	Median Annual Earnings	COL Adjusted Median Hourly Earnings	COL Adjusted Median Annual Earnings
11-0000	Management Occupations	12,970	22,090	9,121	70%	\$44.14	\$91,805.78	\$40.23	\$83,688.04
13-0000	Business and Financial Operations Occupations	11,292	16,101	4,809	43%	\$38.32	\$79,714.26	\$34.94	\$72,665.69
15-0000	Computer and Mathematical Occupations	3,226	4,391	1,165	36%	\$48.48	\$100,838.64	\$44.19	\$91,922.19
17-0000	Architecture and Engineering Occupations	2,203	2,300	97	4%	\$39.42	\$81,988.12	\$35.93	\$74,738.49
19-0000	Life, Physical, and Social Science Occupations	1,520	1,929	410	27%	\$36.68	\$76,293.60	\$33.44	\$69,547.50
21-0000	Community and Social Service Occupations	3,760	4,641	881	23%	\$27.07	\$56,311.91	\$24.68	\$51,332.64
23-0000	Legal Occupations	3,426	5,105	1,680	49%	\$47.56	\$98,934.98	\$43.36	\$90,186.86
25-0000	Educational Instruction and Library Occupations	11,172	11,785	613	5%	\$24.04	\$50,004.23	\$21.91	\$45,582.71
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	3,429	4,385	956	28%	\$26.61	\$55,347.02	\$24.26	\$50,453.07
29-0000	Healthcare Practitioners and Technical Occupations	13,815	17,233	3,418	25%	\$40.52	\$84,288.74	\$36.94	\$76,835.67
31-0000	Healthcare Support Occupations	8,968	10,989	2,020	23%	\$17.08	\$35,527.65	\$15.57	\$32,386.19
33-0000	Protective Service Occupations	11,041	10,149	(892)	(8%)	\$29.58	\$61,536.59	\$26.97	\$56,095.35
35-0000	Food Preparation and Serving Related Occupations	15,601	17,538	1,937	12%	\$16.49	\$34,296.58	\$15.03	\$31,263.98
37-0000	Building and Grounds Cleaning and Maintenance Occupations	12,713	12,836	123	1%	\$15.77	\$32,806.81	\$14.38	\$29,905.94
39-0000	Personal Care and Service Occupations	8,600	8,494	(106)	(1%)	\$15.33	\$31,887.84	\$13.98	\$29,068.22
41-0000	Sales and Related Occupations	24,381	26,105	1,724	7%	\$18.89	\$39,300.70	\$17.22	\$35,825.61
43-0000	Office and Administrative Support Occupations	29,613	28,832	(782)	(3%)	\$21.08	\$43,847.18	\$19.22	\$39,970.08

SOC	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Median Hourly Earnings	Median Annual Earnings	COL Adjusted Median Hourly Earnings	COL Adjusted Median Annual Earnings
45-0000	Farming, Fishing, and Forestry Occupations	5,753	6,018	265	5%	\$13.89	\$28,901.59	\$12.67	\$26,346.03
47-0000	Construction and Extraction Occupations	14,244	16,812	2,568	18%	\$22.59	\$46,992.85	\$20.59	\$42,837.60
49-0000	Installation, Maintenance, and Repair Occupations	9,303	10,763	1,460	16%	\$24.33	\$50,613.47	\$22.18	\$46,138.07
51-0000	Production Occupations	6,139	5,986	(153)	(2%)	\$18.74	\$38,976.31	\$17.08	\$35,529.91
53-0000	Transportation and Material Moving Occupations	13,536	15,711	2,175	16%	\$18.19	\$37,830.55	\$16.58	\$34,485.46
55-0000	Military-only occupations	1,019	985	(34)	(3%)	\$27.51	\$57,218.22	\$25.08	\$52,158.81
99-0000	Unclassified Occupation	0	0	0	0%	\$0.00	\$0.00	\$0.00	\$0.00
		227,723	261,178	33,456	15%				

Source: LightCast 2017, 2025

H. Travel and Commute Patterns

The time and cost of traffic congestion, including increased commute times and lost productivity due to travel delays are tangible economic concerns for today's employers and workers alike. Travel and commute times play an increasingly important role in business location and employment decisions. According to 2024 ACS estimates, most workers in South Miami-Dade are employed in Miami-Dade County. However, average commute times exceed 35 minutes one way which means most workers commute beyond South Miami-Dade to their places of work.

U.S. Census data shows most regional commute times remain below where they were the year before the COVID-19 pandemic. Remote work and flexible hours have contributed to peak traffic times being more spread out. However, in South Miami-Dade, commute times of over one hour have become more common due to rapid population growth and an increase of 33,456 workers since 2017. Most of South Miami-Dade's traffic congestion occurs on the Florida Turnpike and U.S. 1 as workers commute north to their job locations.

According to the 2024 U.S. Census, approximately 69.2% of workers in the United States drive alone to their places of work each day. In South Miami-Dade, an estimated 72.2% of workers (205,799 workers) drive by car alone to their places of work (**See Table 7 below**). While the percentage of workers driving alone is down from 78.09% in 2017, South Miami-Dade has added 7,092 new resident workers who drive alone adding further congestion to the roadways. On a positive note, 12.31% of South Miami-Dade resident workers now work from home, up from 3.86% in 2017. However, excessive commute drive times have become a growing issue for South Miami-Dade resident workers who must travel a distance to their places of work.

Table 7: Means of Transportation to Work South Miami-Dade (2017-2024)

	Workers 16 years and over	Drove alone	Carpooled	Worked from home	Workers 16 years and over	Drove alone	Carpooled	Worked from home	Drove alone	Carpooled	Worked from home
	2017				2024				% Point Change 2017-2024		
Town of Cutler Bay	22,195	78.70%	10.80%	5.20%	22,441	71.20%	8.80%	16.10%	-7.50	-2.00	10.90
Florida City	3,910	50.20%	24.90%	7.20%	4,388	66.50%	16.80%	10.50%	16.30	-8.10	3.30
City of Homestead	27,723	67.30%	18.00%	4.90%	37,804	74.90%	13.30%	6.80%	7.60	-4.70	1.90
Village of Palmetto Bay	11,417	76.40%	14.50%	5.30%	12,353	60.30%	11.20%	21.20%	-16.10	-3.30	15.90
Village of Pinecrest	9,179	75.30%	3.90%	12.20%	8,455	61.00%	6.50%	27.00%	-14.30	2.60	14.80
<i>Census Designated Places (Unincorporated)</i>											
Country Walk CDP	7,702	87.00%	7.20%	2.70%	10,087	74.20%	9.90%	13.80%	-12.80	2.70	11.10
Goulds CDP	3,944	71.80%	15.10%	2.70%	6,184	78.60%	11.20%	4.50%	6.80	-3.90	1.80
Homestead Base CDP	121	35.50%	5.00%	2.50%	141	5.70%	49.60%	1.40%	-29.80	44.60	-1.10
Kendall CDP	38,247	83.10%	6.60%	4.10%	39,445	69.30%	8.30%	15.50%	-13.80	1.70	11.40
Leisure City CDP	10,417	68.50%	20.00%	4.30%	11,756	74.70%	11.30%	9.60%	6.20	-8.70	5.30
Naranja CDP	3,879	82.40%	9.40%	2.20%	6,914	70.30%	13.10%	12.30%	-12.10	3.70	10.10
Palmetto Estates CDP	7,484	75.80%	9.90%	1.60%	7,510	80.40%	10.40%	4.50%	4.60	0.50	2.90
Princeton CDP	12,140	73.90%	16.60%	3.30%	20,930	68.50%	12.20%	14.20%	-5.40	-4.40	10.90
Richmond Heights CDP	5,070	73.50%	9.70%	0.50%	4,876	75.60%	11.00%	6.90%	2.10	1.30	6.40
Richmond West CDP	18,695	82.60%	10.60%	3.00%	17,441	75.30%	9.70%	12.00%	-7.30	-0.90	9.00
South Miami Heights CDP	17,709	80.30%	10.30%	2.10%	18,145	77.50%	11.40%	7.70%	-2.80	1.10	5.60
The Crossings CDP	11,409	84.30%	8.00%	3.30%	12,090	78.20%	7.80%	11.70%	-6.10	-0.20	8.40
The Hammocks CDP	30,004	82.60%	9.30%	2.30%	30,005	71.10%	12.20%	12.60%	-11.50	2.90	10.30
Three Lakes CDP	8,484	85.90%	8.40%	2.30%	9,172	75.10%	7.50%	14.00%	-10.80	-0.90	11.70
West Perrine CDP	4,040	74.90%	11.00%	2.90%	4,864	76.20%	10.30%	3.40%	1.30	-0.70	0.50
South Miami-Dade	253,769	78.09%	11.20%	3.86%	285,001	72.21%	10.65%	12.31%	-5.88	-0.54	8.45
Miami-Dade County	1,251,193	76.80%	8.90%	4.90%	1,356,445	68.70%	9.10%	14.00%	-8.10	0.20	9.10

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

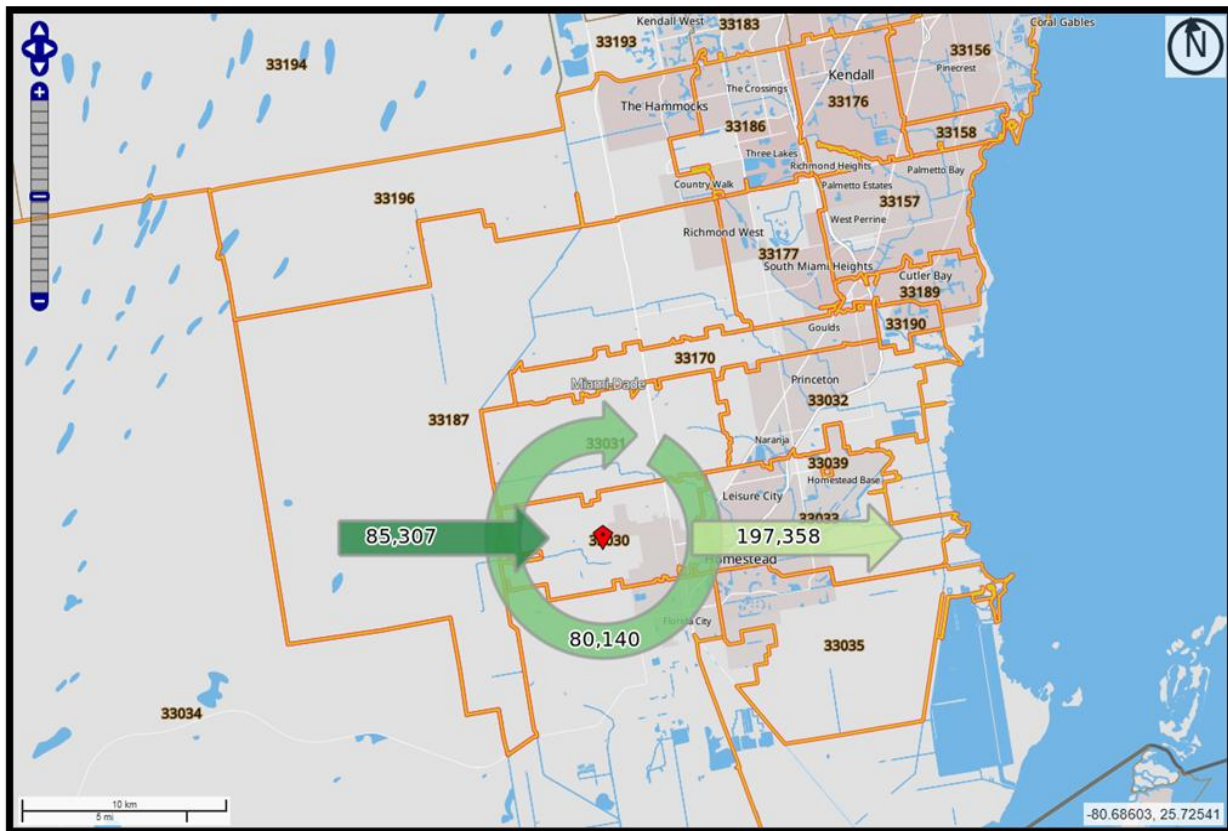
I. Employment Inflow/Outflow

The US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) data tracks where workers live and work. The most recent LEHD data captures employment data slightly differently than the Bureau of Labor Statistics. LEHD indicates a significant mismatch between the jobs located within the trade area, and where employed residents actually work. As shown in **Figure 3**, the key indicators of the Inflow/Outflow analysis available through the LEHD data are as follows:

- Although 277,498 employed residents live in South Miami-Dade, only 80,140 of workers, or 28.87 percent, work in South Miami-Dade;
- This means 197,358 employed residents are employed by businesses somewhere else in the County or beyond;
- This also means 85,307 jobs within South Miami-Dade are filled by workers who live outside and commute in and out of South Miami-Dade;
- The destinations of most South Miami-Dade workers who commute are primarily located within Miami-Dade County; and
- The average commute time for resident employed workers in South Miami-Dade is over 35 minutes each way.

The LEHD analysis does not definitively mean that all resident workers employed outside South Miami-Dade leave each day. Telecommuting data indicates that a significant percentage of the local population mirrors national trends in working from home. However, the Inflow/Outflow analysis does indicate that continuing this pattern without a significant change in working locations, cannot be sustained and risks exacerbating South Miami-Dade's long commutes, traffic congestion, and negatively affecting production, services, and quality of life.

Figure 3: South Miami-Dade Job Inflow / Outflow (2023)



Source: Census On the Map, 2023

An analysis of job counts by specific work locations shows that most South Miami-Dade resident workers are employed in the City of Miami (47,572) followed by Kendall CDP (17,445), the City of Coral Gables (14,179), the City of Doral (12,233), and the City of Homestead (**Table 8**). The balance of workers are employed in municipalities throughout Miami-Dade County.

Table 8: Job Counts by Places where South Dade Residents are Employed - All Jobs (2023)

	Count	Share
Miami City	47,572	17.1%
Kendall CDP	17,445	6.3%
Coral Gables City	14,179	5.1%
Doral City, FL	12,233	4.4%
City of Homestead	10,106	3.6%
Three Lakes CDP	7,251	2.6%
Hialeah City	4,709	1.7%
Palmetto Bay Village	4,310	1.6%
Fort Lauderdale City	4,203	1.5%
Town of Cutler Bay	4,198	1.5%
All Other Locations	151,292	54.5%
Total All Jobs	277,498	100.0%

Source: Census On the Map, 2023

A further analysis of commute distances shows that 74.4% of workers travel 24 miles or less, which is indicative of the distance to the primary job locations shown above. The balance of workers travel 25 miles or more to their work locations, including 12.2% (33,951 workers) who travel greater than 50 miles to their places of work (**Table 9**).

Table 9: Job Counts by Distance (2023)

	Count	Share
Total All Jobs	277,498	100.0%
Less than 10 miles	97,004	35.0%
10 to 24 miles	109,345	39.4%
25 to 50 miles	37,198	13.4%
Greater than 50 miles	33,951	12.2%

Source: Census On the Map, 2023

J. Housing

According to 2024 ACS estimates, there are 204,353 occupied housing units in South Miami-Dade (**Table 10**). This represents a 22.5 percent (37,495 units) increase since 2017. South Miami-Dade's housing supply growth rate far exceeded Miami-Dade County (13.6%) during this period.

Homestead and Florida City experienced the largest housing supply growth rates among municipalities. Naranja (84.2%), Princeton (70.6%) and Goulds (39.2%) had the highest housing supply growth rates among the CDPs.

Table 10: Housing Units and Tenure in South Miami-Dade (2017- 2024)

Municipalities and CDPs	Occupied Housing Units			Owner Occupied		
	2017	2024	% Change	2017	2024	% Change
Town of Cutler Bay	12,682	14,469	14.1%	8,965	10,089	12.5%
Florida City	2,780	4,081	46.8%	727	1,274	75.2%
City of Homestead	18,499	25,638	38.6%	7,253	12,372	70.6%
Village of Palmetto Bay	7,298	8,150	11.7%	6,220	6,376	2.5%
Village of Pinecrest	5,954	6,081	2.1%	4,584	5,037	9.9%
<i>Census Designated Places (Unincorporated)</i>						
Country Walk CDP	4,473	5,630	25.9%	3,805	4,496	18.2%
Goulds CDP	3,145	4,347	38.2%	1,523	2,438	60.1%
Kendall CDP	27,228	30,158	10.8%	17,181	18,747	9.1%
Leisure City CDP	6,755	8,150	20.7%	3,336	3,552	6.5%
Naranja CDP	2,780	5,122	84.2%	700	1,254	79.1%
Palmetto Estates CDP	3,824	4,223	10.4%	2,858	3,646	27.6%
Princeton CDP	7,290	12,439	70.6%	4,368	8,626	97.5%
Richmond Heights CDP	2,641	3,020	14.4%	2,083	2,141	2.8%
Richmond West CDP	9,401	10,617	12.9%	8,041	8,898	10.7%
South Miami Heights CDP	10,570	12,012	13.6%	5,920	7,462	26.0%
The Crossings CDP	7,413	8,392	13.2%	5,745	6,096	6.1%
The Hammocks CDP	16,005	19,623	22.6%	9,379	12,308	31.2%
Three Lakes CDP	4,900	5,348	9.1%	3,275	3,563	8.8%
West Perrine CDP	2,869	3,235	12.8%	1,555	1,736	11.6%
Municipalities and CDPs Totals	156,507	190,735	21.9%	97,518	120,111	23.2%
South Miami-Dade	166,858	204,353	22.5%	105,356	129,403	22.8%
Miami-Dade County	858,289	975,411	13.6%	448,011	509,440	13.7%

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates

III INDUSTRY STRUCTURE & DYNAMICS

A. Economic Base

The economic base represents the economic activities that occur within a specific geographic area whether that be a city, county, or region. The economic base encompasses the production, distribution, and consumption of goods and services within a defined area. Understanding the dynamics of a local economy starts with recognizing it as a community's economic ecosystem, where businesses, residents, and institutions interact financially. A healthy local economy is not just about businesses operating; it's about creating a system where wealth is generated and circulated locally, benefiting the community directly. This designation emphasizes the importance of local ownership, local supply chains, and local spending. The significance of this approach lies in its potential to build resilient, self-sustaining communities and regions.

The economic base of South Miami-Dade County is fused to the larger economy of the county. Miami-Dade County is the largest county in the State of Florida with a population over 2.7 million and the third largest in terms of land area covering nearly 2,000 square miles. Miami-Dade County's economic core runs north to south along the I-95/U.S. 1 Corridor on the east and the Florida Turnpike on the west. The county's economic strengths provide continued opportunities for South Miami-Dade, where the in-migration of a large prime working-age population over the past two decades has created a significant competitive advantage.

Miami-Dade County is a highly competitive economy in a range of industry sectors including healthcare, education, transportation, tourism and hospitality. The distinguishing characteristics of Miami-Dade County's economy include:

- ***Economic Scope*** – Miami-Dade County has the largest and most diversified economy in the State of Florida with a gross domestic product (GDP) of over \$219 billion, an estimated 123,830 employer business establishments and 1,525,512 employer and self-employed jobs;
- ***A Diversified Industry Structure*** – In addition to healthcare, transportation, and leisure and hospitality, Miami-Dade County is home to growing technology sectors and employment in a wide range of high-end professional services, financial services, construction services and support, and manufacturing, especially aerospace components;
- ***Traded Industries*** - Miami-Dade County's top 10 traded industries are concentrated in industries requiring advanced education and/or professional skills, including management of companies and enterprises, legal services, management and technical consulting services, architectural and engineering services, computer systems design and related services;
- ***Growing Presence in the Advanced Industry Sector*** – The advanced industries sector encompasses 50 industries with the highest levels of skills, knowledge, growth, and value-added productivity. Advanced industries range from manufacturing such as automotive and aerospace to high-tech services such as computer software and computer system design. Advanced industries are also deeply engrained with technology research and development (R&D) and STEM (science, technology, engineering, and math);
- ***Growing Presence in the Advanced Industry Sector*** - The advanced industries sector encompasses 50 industries with the highest levels of skills, knowledge, growth, and value-added productivity.

Advanced industries range from manufacturing such as automotive and aerospace to high-tech services such as computer software and computer system design. Advanced industries are also deeply engrained with technology research and development (R&D) and STEM (science, technology, engineering, and math). Both Miami-Dade County and South Miami-Dade are home to a growing number of establishments and workers in the advanced industry sector with business establishments largely found in management, scientific, and technical consulting services, architectural and engineering, and computer systems design; and

- **Foreign Trade Zone 32 & 281** – Businesses conducting operations within Foreign Trade Zones (FTZs) or subzones – granted through the Greater Miami Chamber of Commerce (FTZ 32) or PortMiami (FTZ 281) – receive various benefits, including duty and tax deferrals and reductions. These advantages provide companies with opportunities to improve cash flow and enhance competitiveness.

B. Employment by Industry in South Miami-Dade and Miami-Dade County

According to 2025 data from LightCast, there are 1,525,512 jobs in Miami-Dade County, including both employer-based and self-employed (independent contractor) positions (**Table 11**). Of these, 195,385 are in Health Care, followed by Retail Trade (151,844), Government (150,381), Accommodations and Food Services (Tourism; 139,816), and Professional, Scientific, and Technical Services (120,600). Between 2017 and 2025, Miami-Dade County added 204,276 new jobs, representing a 15% growth rate. Industries with significant growth during this period include Health Care (37,558/24%), Professional and Technical Services (33,045/38%), Transportation and Warehousing (31,603/38%), Construction (20,455/29%), and Real Estate (11,418/31%). The only industry that declined in employment was Retail Trade, with a total loss of 1,340 jobs. This reduction aligns with national trends driven by the growth of e-commerce and shifting consumer preferences.

Table 11: Employer and Self-Employed Total Jobs by Industry, Miami-Dade County (2017- 2025)

NAICS	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Earnings Per Job	COL Adjusted Total Current Earnings
11	Agriculture, Forestry, Fishing and Hunting	12,350	16,474	4,124	33%	\$44,601	\$40,657
21	Mining, Quarrying, and Oil and Gas Extraction	532	609	77	14%	\$146,099	\$133,180
22	Utilities	2,536	3,161	624	25%	\$177,943	\$162,209
23	Construction	71,665	92,120	20,455	29%	\$69,891	\$63,711
31	Manufacturing	43,951	51,124	7,173	16%	\$82,162	\$74,897
42	Wholesale Trade	68,684	75,757	7,072	10%	\$101,603	\$92,619
44	Retail Trade	153,184	151,844	(1,340)	(1%)	\$60,789	\$55,414
48	Transportation and Warehousing	82,196	113,798	31,603	38%	\$91,617	\$83,516
51	Information	19,662	21,940	2,279	12%	\$163,182	\$148,753
52	Finance and Insurance	54,825	62,169	7,343	13%	\$224,035	\$204,225
53	Real Estate and Rental and Leasing	37,345	48,763	11,418	31%	\$81,833	\$74,597
54	Professional, Scientific, and Technical Services	87,556	120,600	33,045	38%	\$133,493	\$121,689

NAICS	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Earnings Per Job	COL Adjusted Total Current Earnings
55	Management of Companies and Enterprises	9,568	12,478	2,910	30%	\$208,354	\$189,931
56	Administrative and Support and Waste Management and Remediation Services	92,554	98,248	5,693	6%	\$58,564	\$53,385
61	Educational Services	43,494	53,912	10,417	24%	\$72,981	\$66,528
62	Health Care and Social Assistance	157,827	195,385	37,558	24%	\$84,048	\$76,616
71	Arts, Entertainment, and Recreation	19,718	25,549	5,831	30%	\$94,207	\$85,877
72	Accommodation and Food Services	128,944	139,816	10,872	8%	\$47,217	\$43,042
81	Other Services (except Public Administration)	84,696	89,411	4,715	6%	\$42,667	\$38,894
90	Government	148,654	150,381	1,726	1%	\$107,336	\$97,845
99	Unclassified Industry	1,293	1,973	680	53%	\$73,060	\$66,600
		1,321,236	1,525,512	204,276	15.46%	\$88,361	\$80,547

Source: LightCast 2017, 2025

Between 2017 and 2025, South Miami-Dade grew from 227,723 to 261,178 employer and self-employed jobs (**Table 12**), representing the creation of 33,456 new jobs (15%). As expected, industry job growth rates in South Miami-Dade generally mirror those of Miami-Dade County. Health Care ranked first, with (8,386/30%) new jobs created between 2017 and 2025, followed by Construction (6,183/33%) and Professional, Scientific, and Technical Services (5,311/45%). While retail jobs decreased across the county by 1,340, South Miami-Dade experienced a growth of 2,349 jobs, highlighting retail's continued role as a traditional component of the region's economic base. However, although the county saw an increase in government jobs (1,726), South Miami-Dade lost 3,287, which may be explained by federal funding cuts and reductions in federal aid. Despite this, it is important to note that during the same period, health care jobs significantly surpassed retail, signaling a shift away from traditional industries toward the targeted sectors identified in the *2020 Strategic Economic Development Plan for South Dade*. Both Miami-Dade and South Miami-Dade grew jobs by nearly the same percentage (15.46% and 14.69%) between 2017 and 2025.

Table 12: Employer and Self-Employed Total Jobs by Industry, South Miami-Dade (2017- 2025)

NAICS	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Earnings Per Job	COL Adjusted Total Current Earnings
11	Agriculture, Forestry, Fishing and Hunting	8,828	10,878	2,050	23%	\$49,019	\$44,685
21	Mining, Quarrying, and Oil and Gas Extraction	107	89	(18)	(17%)	\$133,165	\$121,391
22	Utilities	1,930	1,661	(269)	(14%)	\$185,865	\$169,430
23	Construction	18,515	24,698	6,183	33%	\$70,388	\$64,164
31	Manufacturing	6,194	5,578	(615)	(10%)	\$75,160	\$68,515
42	Wholesale Trade	6,022	7,986	1,964	33%	\$99,410	\$90,620
44	Retail Trade	26,919	29,267	2,349	9%	\$60,816	\$55,438

NAICS	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Earnings Per Job	COL Adjusted Total Current Earnings
48	Transportation and Warehousing	2,642	4,683	2,041	77%	\$76,972	\$70,166
51	Information	1,874	2,807	933	50%	\$155,515	\$141,764
52	Finance and Insurance	9,662	11,094	1,432	15%	\$184,284	\$167,989
53	Real Estate and Rental and Leasing	4,317	5,077	760	18%	\$85,703	\$78,125
54	Professional, Scientific, and Technical Services	11,812	17,123	5,311	45%	\$133,386	\$121,592
55	Management of Companies and Enterprises	655	780	125	19%	\$214,568	\$195,595
56	Administrative and Support and Waste Management and Remediation Services	14,203	14,892	688	5%	\$53,125	\$48,428
61	Educational Services	6,133	8,452	2,318	38%	\$68,406	\$62,357
62	Health Care and Social Assistance	27,952	36,339	8,386	30%	\$80,522	\$73,402
71	Arts, Entertainment, and Recreation	2,094	2,887	792	38%	\$115,676	\$105,447
72	Accommodation and Food Services	15,323	17,697	2,374	15%	\$46,256	\$42,166
81	Other Services (except Public Administration)	20,366	20,123	(243)	(1%)	\$43,410	\$39,571
90	Government	41,957	38,670	(3,287)	(8%)	\$117,383	\$107,004
99	Unclassified Industry	217	397	181	83%	\$73,060	\$66,600
		227,723	261,178	33,456	14.69%	\$85,010	\$77,493

Source: LightCast 2017, 2025

An analysis of South Miami-Dade to Miami-Dade County share of jobs shows that South Miami-Dade has consistently accounted for around 17% of total county jobs between 2017 and 2025 (**Table 13**).

Table 13: Employer-Based and Self-Employed Total Jobs Summary, South Miami-Dade and Miami-Dade County (2017-2025)

	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change
Miami-Dade	1,321,236	1,525,512	204,276	15.46%
South Miami-Dade	227,723	261,178	33,456	14.69%
South Miami-Dade %	17.2%	17.1%	16.4%	

Source: LightCast 2017, 2025; Computations by authors

C. Employer Business Characteristics

To provide a deeper understanding of South Miami-Dade County's employer industries, the FIU Jorge M. Pérez Metropolitan Center applied restricted-use datasets, including the Quarterly Census of Employment and Wages (QCEW) at the individual business establishment level. Access to these datasets using the most detailed and current data available provides critical insights into South Miami-Dade's economic base. The QCEW dataset enables the computation of the number of employer establishments, employment totals, average establishment size, total and average payroll, and average payroll for each industry in South Miami-Dade. It is important to note that employer establishments refer to businesses with paid employees and do not account for independent contractors or self-employed individuals.

The analysis found that South Miami-Dade has 11.9% (14,761) of the county's 123,830 employer establishments and 12.1% (152,039) of the county's 1,261,687 employer jobs (**Table 14**). Industries with

an establishment share exceeding these benchmarks can be considered competitive advantages for South Miami-Dade. For example, Agriculture - a traditional industry in South Miami-Dade - accounts for 55.5% of agricultural establishments and 88.3% of agricultural employment in Miami-Dade County highlighting why agriculture is a key component of South Miami Dade's economic base.

Traditional industries with a significant presence in South Miami-Dade include High-value Retail and Specialty and General Retail, which account for 18.5% and 23% of employer jobs, respectively. In terms of emerging targeted industries, South Miami-Dade hosts 2,436 (15%) of Miami-Dade County's 16,283 health care establishments and 14.2% of the county's Health Care employment, indicating a strong presence of health care in South Miami-Dade. Although slightly below the standard South Miami-Dade-to-Miami-Dade County ratio, Finance and Insurance shows a growing presence in South Miami-Dade accounting for 720 (10.9%) of Miami-Dade's 6,588 employer establishments and 5,806 (10.6%) of Miami-Dade's 54,945 employer jobs. In Professional, Scientific, and Technical Services, South Miami-Dade accounts for 2,133 (9.5%) of Miami-Dade's 22,556 establishments, and 10,448 (10.2%) of Miami-Dade's 102,888 employment. Note that for each of the targeted industries the percentage of South Miami-Dade to Miami-Dade employment follow closely the same ratios as their corresponding percentages of South Miami-Dade to Miami-Dade establishments. This is easier to observe in the comparison of average number of employees per establishment between South Miami-Dade and Miami-Dade County.

Table 14: Employer Establishment Counts and Employment by Industry, South Miami-Dade and Miami-Dade (2025)

NAICS	Industries	Miami-Dade	South Miami-Dade	South Miami-Dade	Miami-Dade	South Miami-Dade	South Miami-Dade	Miami-Dade	South Miami-Dade
2-Digit	Description	Establishments	Establishments	Percent	Employment	Employment	Percent	Avg. Employees per establishment	Avg. Employees per establishment
11	Agriculture, Forestry, Fishing and Hunting	530	294	55.5%	8,396	7,411	88.3%	15.8	25.2
21	Mining, Quarrying, and Oil and Gas Extraction	38	10	26.3%	555	55	9.9%	14.6	5.5
22	Utilities	120	12	10.0%	2,956	867	29.3%	24.6	72.3
23	Construction	8,531	1,542	18.1%	59,965	11,348	18.9%	7.0	7.4
31	Food, Textile, and Apparel Manufacturing	846	96	11.3%	9,878	999	10.1%	11.7	10.4
32	Wood, Paper, Petroleum, Chemical Manufacturing	919	92	10.0%	14,729	1,317	8.9%	16.0	14.3
33	Metal, Machinery, and Transportation Manufacturing	1,704	166	9.7%	21,301	2,090	9.8%	12.5	12.6
42	Wholesale Trade	8,554	780	9.1%	71,983	7,026	9.8%	8.4	9.0
44	Traditional and High Value Retailers	4,945	652	13.2%	69,850	16,038	23.0%	14.1	24.6
45	Specialty and General Retailers	7,052	877	12.4%	69,349	12,836	18.5%	9.8	14.6
48	Transportation	3,717	278	7.5%	68,573	1,503	2.2%	18.4	5.4
49	Warehousing	726	67	9.2%	30,703	2,018	6.6%	42.3	30.1
51	Information	2,527	218	8.6%	18,887	2,176	11.5%	7.5	10.0
52	Finance and Insurance	6,588	720	10.9%	54,945	5,806	10.6%	8.3	8.1
53	Real Estate and Rental and Leasing	7,190	666	9.3%	36,258	2,518	6.9%	5.0	3.8
54	Professional, Scientific, and Technical Services	22,556	2,133	9.5%	102,888	10,448	10.2%	4.6	4.9
55	Management of Companies and Enterprises	1,128	78	6.9%	12,291	645	5.2%	10.9	8.3
56	Administrative and Support and Waste Management and Remediation Services	7,042	1,023	14.5%	75,050	9,953	13.3%	10.7	9.7
61	Educational Services	1,715	248	14.5%	74,056	5,924	8.0%	43.2	23.9

NAICS	Industries	Miami-Dade	South Miami-Dade	South Miami-Dade	Miami-Dade	South Miami-Dade	South Miami-Dade	Miami-Dade	South Miami-Dade
2-Digit	Description	Establishments	Establishments	Percent	Employment	Employment	Percent	Avg. Employees per establishment	Avg. Employees per establishment
62	Health Care and Social Assistance	16,283	2,436	15.0%	196,328	27,900	14.2%	12.1	11.5
71	Arts, Entertainment, and Recreation	1,976	197	10.0%	20,743	1,872	9.0%	10.5	9.5
72	Accommodation and Food Services	6,971	759	10.9%	133,423	15,194	11.4%	19.1	20.0
81	Other Services (except Public Administration)	9,073	1,118	12.3%	39,933	4,937	12.4%	4.4	4.4
92	Public Administration	195	9	4.6%	67,819	1,067	1.6%	347.8	118.6
99	Unclassified	2,904	290	10.0%	828	91	11.0%		
	Totals	123,830	14,761	11.9%	1,261,687	152,039	12.1%		

Source: Quarterly Census of Employment and Wages, 2025

The ratio pattern does not hold in the Transportation and Warehousing industry. In South Miami-Dade, the average number of employees per warehousing establishment is 30.1 compared to 42.3 in Miami-Dade County. One possible explanation for this difference is that the economic opportunity and interest in building new warehousing in South Miami-Dade is driven not only by lower land cost, but also by the ability to design facilities that can accommodate sophisticated robotics from the outset, which require fewer employees per establishment to operate. Accommodating modern warehouse facilities for robotics and automation requires taller warehouse ceilings as well as firmer floors capable of withstanding heavier loads. These structural features are more difficult to achieve in Miami-Dade's logistic hub located west of the Miami International Airport (MIA), where retrofitting older warehouses would be significantly more expensive or cost prohibitive.

In terms of total payroll per industry – the total amount paid to all employees – no other industry in South Miami-Dade generated more payroll than Health Care, at \$1.75 billion, distantly followed by Professional, Scientific, and Technical Services at \$892 million (**Table 15**). Both are considered targeted emerging industries. Among the remaining targeted industries, Finance and Insurance ranked third, generating \$552 million in total payroll, followed by Warehousing (\$150 million), Transportation (\$96 million), and Arts, Entertainment and Recreation (\$65 million). In total, all employer establishments in South Miami-Dade generated \$8.98 billion in payroll, representing 9.3% of the \$96.1 billion total payroll generated in Miami-Dade County.

Table 15: Employer Total Payroll and Average Payroll by Industry, South Miami-Dade and Miami-Dade (2025)

NAICS	Industries	Miami-Dade	South Miami-Dade	South Miami-Dade	Miami-Dade	South Miami-Dade	South Miami-Dade
2-Digit	Description	Total Payroll	Total Payroll	Percent	Average Payroll	Average Payroll	Percent
11	Agriculture, Forestry, Fishing and Hunting	\$408,757,044	\$365,251,312	89.4%	\$48,685	\$49,285	101%
21	Mining, Quarrying, and Oil and Gas Extraction	\$64,317,064	\$3,864,844	6.0%	\$115,887	\$70,270	61%
22	Utilities	\$370,663,920	\$130,442,140	35.2%	\$125,394	\$150,452	120%
23	Construction	\$4,142,686,436	\$682,615,396	16.5%	\$69,085	\$60,153	87%
31	Food, Textile, and Apparel Manufacturing	\$507,220,412	\$44,784,832	8.8%	\$51,348	\$44,830	87%
32	Wood, Paper, Petroleum, Chemical Manufacturing	\$1,061,263,228	\$128,980,212	12.2%	\$72,053	\$97,935	136%
33	Metal, Machinery, and Transportation Manufacturing	\$1,458,320,540	161,475,900	11.1%	\$68,463	\$77,261	113%
42	Wholesale Trade	\$6,022,164,896	\$529,829,724	8.8%	\$83,661	\$75,410	90%
44	Traditional and High Value Retailers	\$3,765,361,760	\$805,446,076	21.4%	\$53,906	\$50,221	93%
45	Specialty and General Retailers	\$3,049,769,980	\$447,138,540	14.7%	\$43,977	\$34,835	79%
48	Transportation	\$5,878,091,048	\$96,004,808	1.6%	\$85,720	\$63,875	75%
49	Warehousing	\$1,764,618,804	\$150,489,896	8.5%	\$57,474	\$74,574	130%
51	Information	\$2,630,530,144	\$332,196,376	12.6%	\$139,277	\$152,664	110%
52	Finance and Insurance	\$8,826,477,000	\$552,912,456	6.3%	\$160,642	\$95,231	59%
53	Real Estate and Rental and Leasing	\$2,498,419,488	\$137,683,448	5.5%	\$68,907	\$54,680	79%
54	Professional, Scientific, and Technical Services	\$12,062,630,224	\$892,894,588	7.4%	\$117,240	\$85,461	73%
55	Management of Companies and Enterprises	\$1,750,969,452	\$71,826,780	4.1%	\$142,459	\$111,359	78%
56	Administrative and Support and Waste Management and Remediation Services	\$4,110,029,460	\$530,660,940	12.9%	\$54,764	\$53,317	97%
61	Educational Services	\$392,505,604	\$312,843,820	5.8%	\$72,817	\$52,810	73%
62	Health Care and Social Assistance	\$14,130,626,580	\$1,752,065,848	12.4%	\$71,975	\$62,798	87%
71	Arts, Entertainment, and Recreation	\$1,733,738,236	\$65,229,648	3.8%	\$83,582	\$34,845	42%
72	Accommodation and Food Services	\$5,813,700,484	\$478,416,252	8.2%	\$43,573	\$31,487	72%
81	Other Services (except Public Administration)	\$2,044,076,860	\$221,072,164	10.8%	\$51,188	\$44,779	87%
92	Public Administration	\$6,660,924,752	\$83,192,132	1.2%	\$98,216	\$77,968	79%
99	Unclassified	\$45,948,804	\$ 6,407,096	13.9%	\$55,494	\$70,408	127%
	Totals	\$96,193,812,220	\$8,983,725,228	9.3%			

Source: Quarterly Census of Employment and Wages, 2025

D. Employment Size and Structure

One of the core goals of the *2020 Economic Development Strategic Plan for South Dade* was to support small businesses' growth and their 24-month survival milestone. Proposed solutions included the creation of small business week, offering technical assistance and workshops, and the creation of a one-stop resource center to help connect small business owners to community resources- housed through the EDC of South Miami-Dade website. Although some of these proposed initiatives have yet to take off, including the development of a small business online resources portal, it is important to consider the local firm size

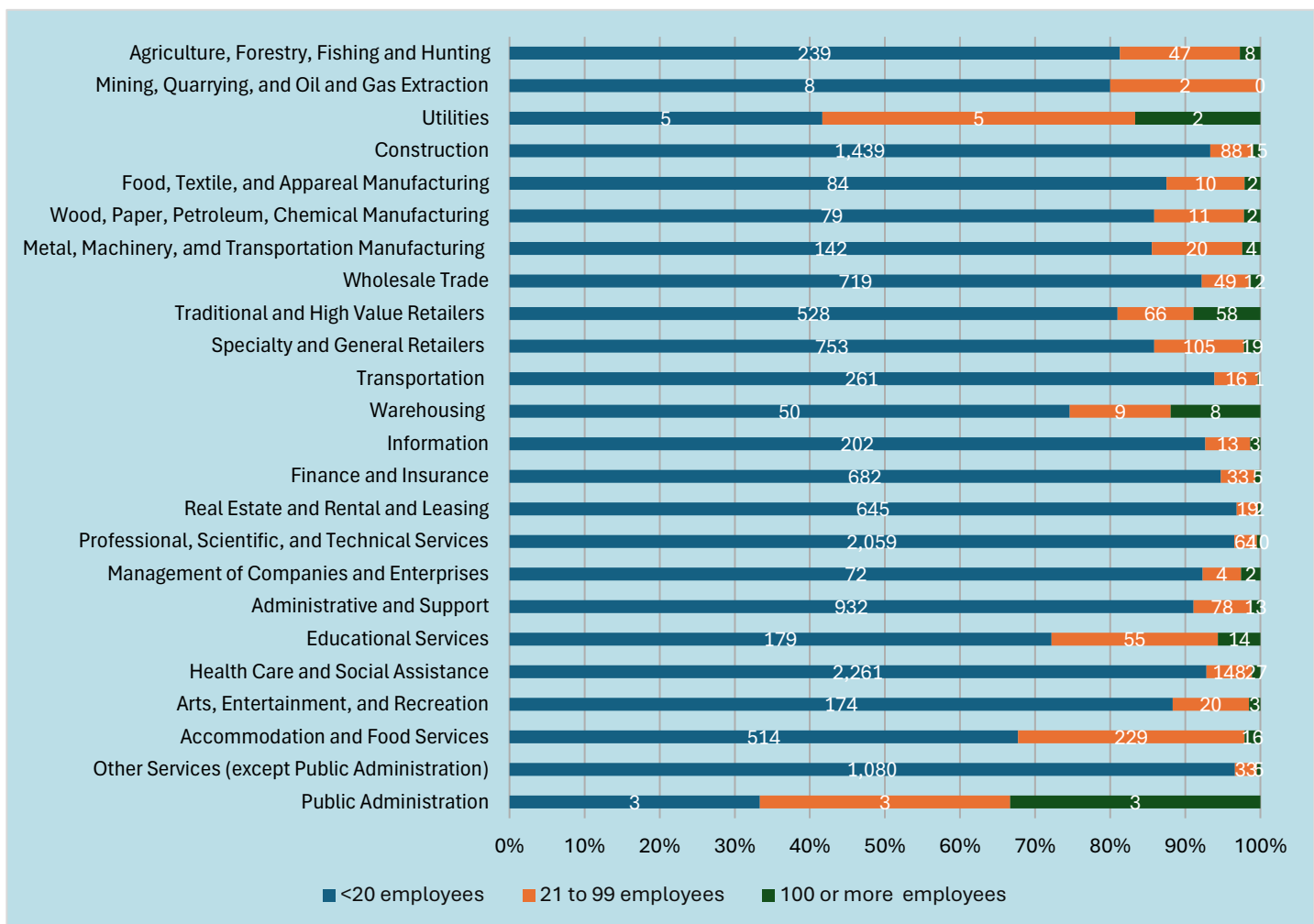
structure of South Miami-Dade. As shown in **Table 16**, 13,400 (91%) of the 14,761 employer businesses are small, having 20 or less employees. While small businesses with 20 employees or less comprise the vast number of business establishments in both South Miami-Dade and Miami-Dade County, it is significant to note that the 234 businesses in South Miami-Dade with 100+ employees generate 62,612 jobs. **Figure 4** illustrates the size composition of employer businesses in South Miami-Dade by industry.

Table 16: Business Employment Size Structure in South Miami-Dade 2025

Number of Employees	Number of Businesses	% of Businesses	Total Employees	% of Employees
<20	13,400	91%	44,240	29%
21 to 99	1,127	8%	45,187	30%
100 or more	234	2%	62,612	41%
Total	14,761	100%	152,039	100%

Source: Quarterly Census of Employment and Wages, 2025

Figure 4: Businesses by Employment Size Structure and Industry - South Miami-Dade (2025)



Source: Quarterly Census of Employment and Wages, 2025

E. Industry Clusters

Competitive and resilient local economies are characterized by the spatial concentration and organization of production and services among industry growth sectors. These concentrations or clusters consist of companies, suppliers, and services which provide inputs to each other and rely on each other for growth. Industry clusters are a central component of economic competitiveness — they bring together technology, information, specialized talent, competing companies, academic institutions, and other linkages and organizations in close proximity to yield better market information, pools of specialized talent, and faster deployment of new knowledge. Improving the performance of clusters, not just individual companies, is a central feature of leading economic development policy.

Targeting economic development resources on priority industries and industry clusters is a traditional means of strategically allocating resources and effort to support those industries where public and private investment can have the biggest impact on future economic growth. Targeting policy and programs means building on existing local strengths - identifying and applying resources on industries with proven capabilities, infrastructure, and assets on which to grow. Focusing policy, programs, and resources on a small set of critical industries has many advantages including:

- Identifying and targeting industries with the greatest local economic impact and probabilities for growth increases the effectiveness of local policy and program initiatives, ensuring that scarce dollars are invested in industries and industry clusters that will have the most significant impact on the rest of the local economy;
- Target, cluster-based strategies can improve local economic performance by addressing the common needs of local businesses, and further improve the effectiveness of local policy;
- Developing efficient and effective economic development policy is especially critical in the current political climate, as local governments will be dealing with considerably lower levels of state and federal funding support for the foreseeable future;
- Cluster strategies permit the integration and targeting of resources in ways that are consistent with the multiple goals of economic development programs: business recruitment, retention, expansion and new-business creation;
- Creating a local cluster framework as part of a local economic development strategic plan can help mobilize highly committed employers, foster collaboration by bringing together participants from targeted industries and help implement the actions identified in the collaborative process. Job creation and new entrepreneurial innovations are more likely to flourish in such a collaborative environment. Examples include Silicon Valley, California and the Research Triangle in North Carolina;
- Proper targeting of resources and programs will result in faster economic growth than scattershot efforts, or programs trying to build entirely new industries where they did not exist before; and
- A carefully target industry program and policy builds on established local industry experience, expertise, and talent, which is a critical component in creating a successful entrepreneurial ecosystem. Rates of successful new business start-ups, survival, and growth rates are considerably higher for new businesses supplying the needs of existing, established, strong local industry sectors.

The Miami-Dade Beacon Council, as part of its One Community One Goal (OCOG) Targeted Industry Strategic Plan identified and described seven “target industries” in the county. These include:

- 1) Aviation
- 2) Creative Industries
- 3) Financial Services
- 4) Hospitality & Tourism
- 5) Life Sciences & Health Care
- 6) Technology
- 7) Trade & Logistics

The *2020 Strategic Economic Development Plan for South-Dade* identified targeted industries which fell into two groupings: Emerging Industries and Traditional Industries. The Emerging Industries coincide, for the most part, with the OCOG target industries including Health Care, Aviation Maintenance Repair & Overhaul (MRO), Tourism, Professional Services, Logistics, and Insurance. These industries were projected “to experience significant growth within the foreseeable future.” For Traditional Industries such as Defense, Agriculture, and Retail, regional growth “was expected to be slow, static, or negative when compared to the past.”

F. Advanced Industries Sector

An important measure of a region’s competitiveness and growth potential is the presence of business establishments in the Advanced Industries Sector. According to the Brookings Institution, the Advanced Industries Sector includes important regional core industries that drive many of the nation’s best performing regional economies. From a local economic development perspective, not only do these core industries help improve economic competitiveness, but they also provide acutely needed high-skill, high paying employment opportunities.

The Advanced Industries Sector is composed of 50 industries identified at the 4-digit NAICS level, and includes manufacturing industries, chemicals, pharmaceuticals, advanced metals, industrial machinery, medical equipment manufacture, energy development and distribution, software design, data processing and hosting, and medical and diagnostic labs.

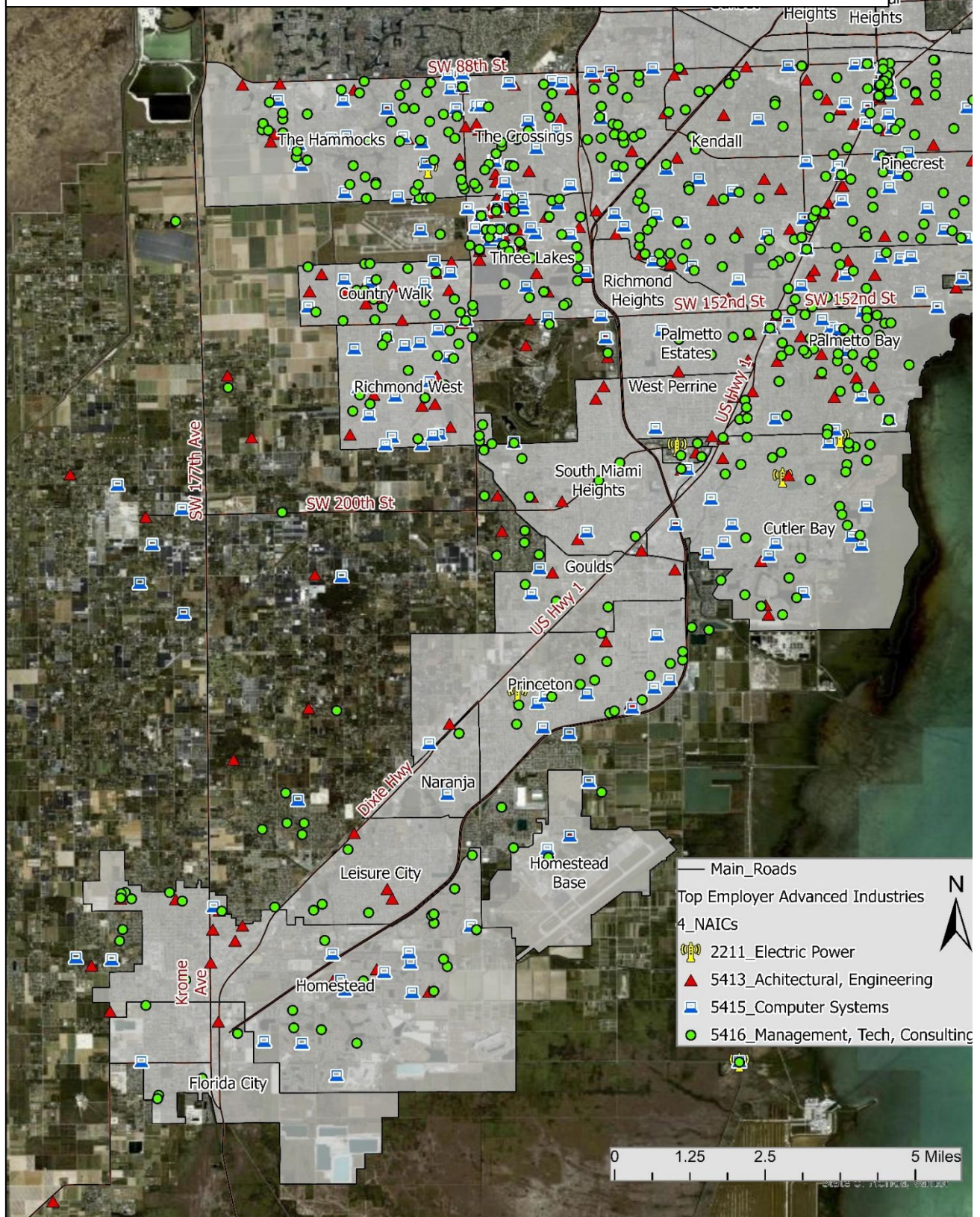
Miami-Dade County has an increasing proportion of business establishments and employees in the advanced industries sector (see **Appendix A**). Advanced industry employment in South Miami-Dade generally compares with Miami-Dade County, but at a smaller scale. South Miami-Dade is home to a significant number of establishments (349) and workers (3,152) in the advanced industry sector (**Table 17**). South Miami-Dade jobs in the advanced industries sector are largely found in Management, Scientific, and Technical Consulting Services (528 establishments), Architectural, Engineering (243 establishments, and Computer Systems Design and Related Services (230 establishments). **Figure 5** provides the spatial distribution of South Miami-Dade’s top 4 advanced industries by employment.

Table 17: Advanced Industry Employer Establishment and Employment, South Miami-Dade (2025)

4-Digit	Description	Establishments	Employment	Total Payroll	Average Payroll
5413	Architectural, Engineering, and Related Services	243	1,503	\$123,449,664	\$82,136
5416	Management, Scientific, and Technical Consulting Services	528	1,256	\$118,059,256	\$93,996
2211	Electric Power Generation, Transmission and Distribution	7	803	\$125,965,900	\$156,869
5415	Computer Systems Design and Related Services	230	696	\$78,405,280	\$112,651
5182	Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services	30	568	\$212,955,368	\$374,921
3254	Pharmaceutical and Medicine Manufacturing	6	566	\$49,377,764	\$87,240
3366	Ship and Boat Building	13	487	\$26,500,296	\$54,415
6215	Medical and Diagnostic Laboratories	40	378	\$20,822,384	\$55,086
3364	Aerospace Product and Parts Manufacturing	13	331	\$24,209,132	\$73,139
3391	Medical Equipment and Supplies Manufacturing	23	321	\$37,247,308	\$116,035
5417	Scientific Research and Development Services	44	184	\$12,962,304	\$70,447
3339	Other General Purpose Machinery Manufacturing	7	114	\$7,187,536	\$63,049
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	9	109	\$21,828,244	\$200,259
3353	Electrical Equipment Manufacturing	4	103	\$3,661,496	\$35,549
3341	Computer and Peripheral Equipment Manufacturing	2	101	\$9,933,780	\$98,354
3369	Other Transportation Equipment Manufacturing	3	84	\$6,008,996	\$71,536
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	6	62	\$6,451,268	\$104,053
3399	Other Miscellaneous Manufacturing	12	51	\$2,689,120	\$52,728
3331	Agriculture, Construction, and Mining Machinery Manufacturing	4	40	\$2,444,192	\$61,105
3342	Communications Equipment Manufacturing	3	36	\$3,747,696	\$104,103

Source: Quarterly Census of Employment and Wages, 2025

Figure 5: Distribution of top 4 Advanced Industries by Employment in South Miami-Dade (2025)



Source: Quarterly Census of Employment and Wages, 2025; Geoprocessing analysis by authors

G. Economic Geography of South Miami-Dade

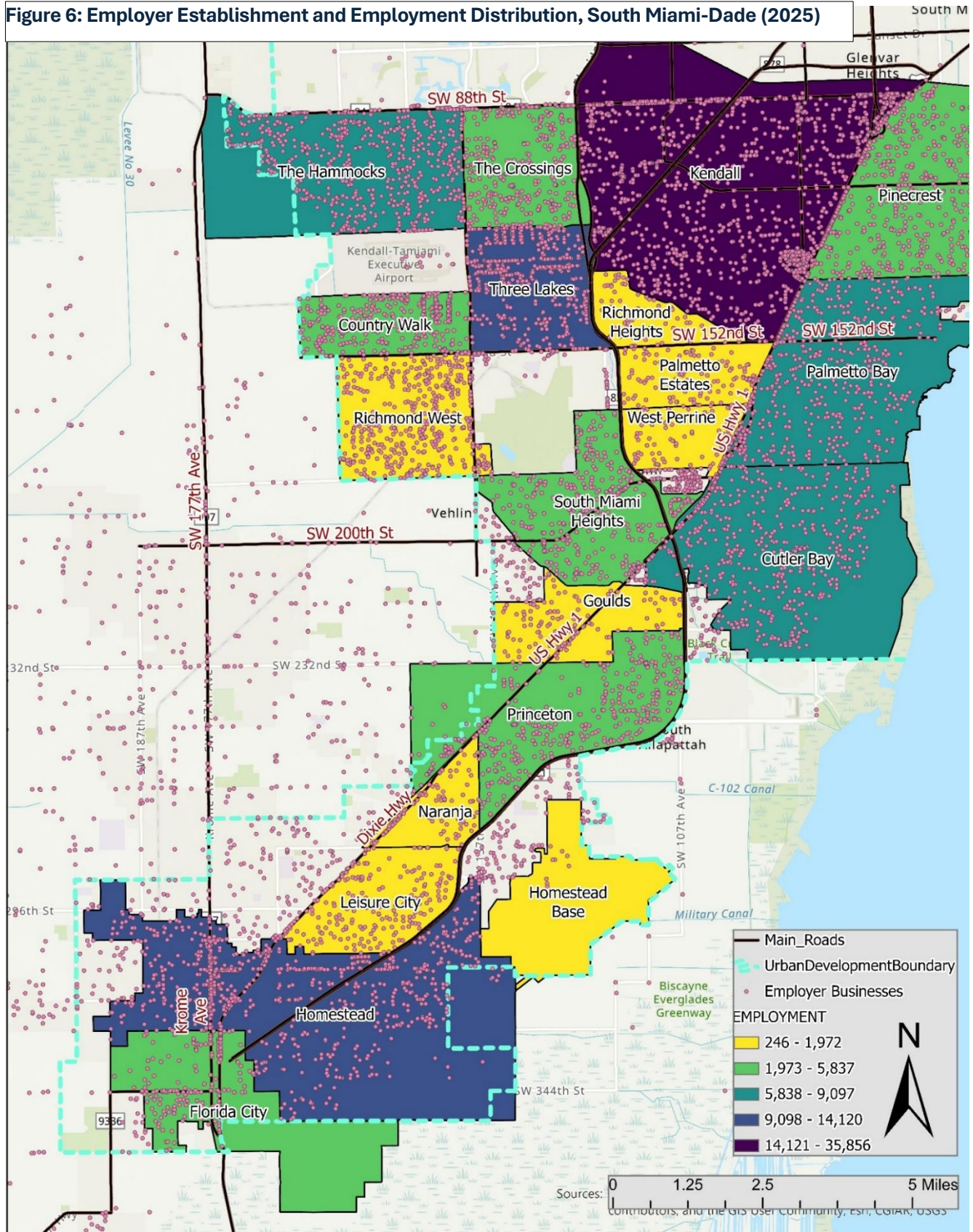
Using QCEW data, an analysis was performed to determine the spatial distribution of employer establishments in South Miami-Dade County by municipality and CDP (**Table 18**). Coordinates were available for 96.8% of establishments which account for 98.7% of total employment in the South Miami-Dade (**Figure 6**). Among the municipalities, The City of Homestead has the highest concentration of employer-based businesses (1,093) and employees (13,158). Among CDPs, Kendall (2,705/35,856) and Three Lakes (1,347/14,120) have the highest concentrations of employer establishments and employees.

Table 18: Employer Establishment and Employment by Municipalities, South Miami-Dade (2025)

GEOID	Municipalities and CDPs	Employer Businesses	Employment	Annual Payroll
1232275	City of Homestead	1,093	13,158	\$662,610,572
1254275	Village of Palmetto Bay	874	6,762	\$396,660,376
1215968	Town of Cutler Bay	755	6,378	\$279,047,448
1256625	Village of Pinecrest	926	5,837	\$360,308,432
1222975	Florida City	311	4,874	\$391,768,308
	<i>Municipalities Totals</i>	3,959	37,009	\$2,090,395,136
1236100	Kendall CDP	2,705	35,856	\$2,617,523,788
1271741	Three Lakes CDP	1,347	14,120	\$837,144,828
1271569	The Hammocks CDP	988	9,097	\$585,870,148
1215055	Country Walk CDP	536	5,679	\$345,853,592
1267575	South Miami Heights CDP	439	5,167	\$311,216,952
1271567	The Crossings CDP	464	3,859	\$170,479,280
1258975	Princeton CDP	428	3,491	\$182,400,644
1260230	Richmond West CDP	532	1,972	\$75,526,212
1239950	Leisure City CDP	236	1,376	\$50,789,588
1254300	Palmetto Estates CDP	152	1,350	\$47,334,236
1276700	West Perrine CDP	117	1,028	\$47,063,448
1247700	Naranja CDP	137	935	\$29,622,108
1226950	Goulds CDP	153	760	\$32,094,600
1260225	Richmond Heights CDP	76	484	\$19,215,068
1232325	Homestead Base CDP	36	246	\$18,048,504
	<i>CDPs Totals</i>	8,346	85,420	\$5,370,182,996

Source: Quarterly Census of Employment and Wages, 2025

Figure 6: Employer Establishment and Employment Distribution, South Miami-Dade (2025)



Source: Quarterly Census of Employment and Wages, 2025; Geoprocessing analysis by authors

H. Self-Employed Workers

There are 36,385 total number of self-employed workers in South Miami-Dade (**Table 19**). This represents 13.9% of total employment. Self-employed workers are a growing percentage of the labor force and include a range of occupations within a cross-sector of industries. The total number of self-employed workers has increased by 30% since 2017.

In South Miami-Dade, the largest number of self-employed workers are in Construction (9,333 workers), other services, except Public Administration (5,334 workers), and Administrative and Waste Management Services (5,027 workers). Two growing sectors of note since 2017 are Health Care and Social Assistance (68% increase) and Manufacturing (63% increase).

Table 19: Self-Employed Workers in South Miami-Dade

NAICS	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Earnings Per Job	COL Adjusted Total Current Earnings
11	Agriculture, Forestry, Fishing and Hunting	395	755	360	91%	\$47,002	\$42,846
21	Mining, Quarrying, and Oil and Gas Extraction	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data
22	Utilities	26	45	19	74%	\$56,540	\$51,540
23	Construction	7,028	9,333	2,304	33%	\$41,093	\$37,459
31	Manufacturing	457	744	287	63%	\$47,694	\$43,476
42	Wholesale Trade	384	412	28	7%	\$73,557	\$67,053
44	Retail Trade	1,247	1,715	468	38%	\$43,030	\$39,225
48	Transportation and Warehousing	1,064	1,454	390	37%	\$44,311	\$40,393
51	Information	236	308	71	30%	\$37,715	\$34,381
52	Finance and Insurance	427	715	288	68%	\$102,187	\$93,151
53	Real Estate and Rental and Leasing	1,740	1,814	74	4%	\$60,228	\$54,903
54	Professional, Scientific, and Technical Services	1,979	2,764	784	40%	\$67,907	\$61,902
55	Management of Companies and Enterprises	0	0	0	0%	\$0	\$0
56	Administrative and Support and Waste Management and Remediation Services	4,240	5,027	787	19%	\$30,024	\$27,369
61	Educational Services	653	818	165	25%	\$35,841	\$32,672
62	Health Care and Social Assistance	2,003	3,373	1,370	68%	\$65,966	\$60,133
71	Arts, Entertainment, and Recreation	701	815	114	16%	\$39,182	\$35,718
72	Accommodation and Food Services	553	958	404	73%	\$38,267	\$34,883
81	Other Services (except Public Administration)	4,781	5,334	553	12%	\$29,327	\$26,733
90	Government	0	0	0	0%	\$0	\$0
99	Unclassified Industry	0	0	0	0%	\$0	\$0
		27,916	36,385	8,469	30%	\$44,935	\$40,962

Source: LightCast 2017, 2025

I. Benchmarking South Miami-Dade's Employment Growth to Miami-Dade County: 2017-2025

The 2020 Strategic Economic Development Plan for South-Dade identified targeted industries which fell into two groupings: Emerging Industries and Traditional Industries. Emerging Industries coincide, for the most part, with the Beacon Council's One Community One Goal (OCOG) target industries including Health Care, Aviation Maintenance Repair & Overhaul (MRO), Tourism, Professional Services, Logistics, and Insurance. These industries were projected "to experience significant growth within the foreseeable future." For Traditional Industries such as Defense, Agriculture, and Retail, regional growth "was expected to be slow, static, or negative when compared to the past."

For those Emerging Industries or critical area industries detailed within the goal was by 2027 to increase the growth in number of jobs by a multiplier of 1.5 times the historic ratio (20%) of South Miami-Dade vs. county-wide jobs for a specific industry. The plan noted that while population growth had been a considerable driver of growth and would continue to be robust for the foreseeable future, South Miami-Dade was not generating the jobs to support its resident base when compared to other areas of the county.

A benchmark analysis of industry job growth in South Miami-Dade 2017-2025 indicates the region fell short in most industry categories including the Emerging Industries targeted in the 2017 plan (see **Table 20 below**). Significant job growth shortfalls are found in Health Care and Professional, Scientific, and Technical Services, Transportation and Warehousing (Logistics), and to a lesser extent, Accommodation and Food Services (Tourism), and Finance and Insurance. The Manufacturing sector also fell way short of its targeted growth level. However, an analysis of the Aviation sector found significant growth in Aerospace Product and Parts Manufacturing.

Table 20: Industry Benchmarks (2017-2025)

NAICS	Description	2017 - 2025 Miami-Dade Job Growth	2017 - 2025 Targeted Growth for South Miami- Dade	2017 - 2025 Actual Growth for South Miami- Dade	Growth Surplus or Deficit to Targeted Growth
11	Agriculture, Forestry, Fishing and Hunting	4,124	1,237	2,050	813
21	Mining, Quarrying, and Oil and Gas Extraction	77	23	(18)	(41)
22	Utilities	624	187	(269)	(457)
23	Construction	20,455	6,137	6,183	47
31	Manufacturing	7,173	2,152	(615)	(2,767)
42	Wholesale Trade	7,072	2,122	1,964	(158)
44	Retail Trade	(1,340)	(402)	2,349	2,751
48	Transportation and Warehousing	31,603	9,481	2,041	(7,440)
51	Information	2,279	684	933	249
52	Finance and Insurance	7,343	2,203	1,432	(771)
53	Real Estate and Rental and Leasing	11,418	3,425	760	(2,666)
54	Professional, Scientific, and Technical Services	33,045	9,913	5,311	(4,603)
55	Management of Companies and Enterprises	2,910	873	125	(748)

NAICS	Description	2017 - 2025 Miami-Dade Job Growth	2017 - 2025 Targeted Growth for South Miami- Dade	2017 - 2025 Actual Growth for South Miami- Dade	Growth Surplus or Deficit to Targeted Growth
56	Administrative and Support and Waste Management and Remediation Services	5,693	1,708	688	(1,020)
61	Educational Services	10,417	3,125	2,318	(807)
62	Health Care and Social Assistance	37,558	11,267	8,386	(2,881)
71	Arts, Entertainment, and Recreation	5,831	1,749	792	(957)
72	Accommodation and Food Services	10,872	3,262	2,374	(888)
81	Other Services (except Public Administration)	4,715	1,415	(243)	(1,657)
90	Government	1,726	518	(3,287)	(3,805)
99	Unclassified Industry	680	204	181	(23)
		204,276	61,283	33,456	(27,827)

Source: LightCast 2017, 2025; Computations by authors

J. Projected Job Growth - 2025-2035

Industry job growth projections are obtained through Lightcast, which uses a variety of data sources, including the Bureau of Labor Statistics Quarterly Census of Employment, and are adjusted using wage data and the National Industry-Occupation Employment Matrix (NIOEM). Projections are derived using the last 15 years of historical employment data. Between 2025 and 2035, Miami-Dade County is projected to create 90,230 new jobs (**Table 21**), out of which South Miami-Dade is projected to capture 15.75% of this growth or 14,212 new jobs (**Table 22**).

Table 21: Employer-Based and Self-Employed Job Growth Forecast, Miami-Dade (2025- 2035)

NAICS	Description	2025 Jobs	2035 Jobs	2025 - 2035 Change	2025 - 2035 % Change
11	Agriculture, Forestry, Fishing and Hunting	16,474	18,833	2,358	14%
21	Mining, Quarrying, and Oil and Gas Extraction	609	693	84	14%
22	Utilities	3,161	3,391	230	7%
23	Construction	92,120	101,421	9,301	10%
31	Manufacturing	51,124	53,524	2,400	5%
42	Wholesale Trade	75,757	77,322	1,565	2%
44	Retail Trade	151,844	154,127	2,284	2%
48	Transportation and Warehousing	113,798	123,769	9,971	9%
51	Information	21,940	22,269	328	1%
52	Finance and Insurance	62,169	64,586	2,418	4%
53	Real Estate and Rental and Leasing	48,763	55,296	6,533	13%
54	Professional, Scientific, and Technical Services	120,600	136,305	15,705	13%
55	Management of Companies and Enterprises	12,478	13,324	846	7%

NAICS	Description	2025 Jobs	2035 Jobs	2025 - 2035 Change	2025 - 2035 % Change
56	Administrative and Support and Waste Management and Remediation Services	98,248	100,180	1,933	2%
61	Educational Services	53,912	57,505	3,593	7%
62	Health Care and Social Assistance	195,385	212,408	17,023	9%
71	Arts, Entertainment, and Recreation	25,549	28,031	2,481	10%
72	Accommodation and Food Services	139,816	151,949	12,132	9%
81	Other Services (except Public Administration)	89,411	94,262	4,851	5%
90	Government	150,381	144,254	(6,126)	(4%)
99	Unclassified Industry	1,973	2,291	318	16%
		1,525,512	1,615,742	90,230	5.9%

Source: LightCast 2025, 2035

Table 22: Employer-Based and Self-Employed Job Growth Forecast, South Miami-Dade (2025- 2035)

NAICS	Description	2025 Jobs	2035 Jobs	2025 - 2035 Change	2025 - 2035 % Change
11	Agriculture, Forestry, Fishing and Hunting	10,878	11,574	696	6%
21	Mining, Quarrying, and Oil and Gas Extraction	89	96	7	8%
22	Utilities	1,661	1,771	110	7%
23	Construction	24,698	27,405	2,707	11%
31	Manufacturing	5,578	5,895	317	6%
42	Wholesale Trade	7,986	8,153	167	2%
44	Retail Trade	29,267	29,746	478	2%
48	Transportation and Warehousing	4,683	5,154	470	10%
51	Information	2,807	2,885	77	3%
52	Finance and Insurance	11,094	11,373	280	3%
53	Real Estate and Rental and Leasing	5,077	5,625	548	11%
54	Professional, Scientific, and Technical Services	17,123	19,090	1,966	11%
55	Management of Companies and Enterprises	780	818	38	5%
56	Administrative and Support and Waste Management and Remediation Services	14,892	15,120	228	2%
61	Educational Services	8,452	9,001	549	6%
62	Health Care and Social Assistance	36,339	39,445	3,107	9%
71	Arts, Entertainment, and Recreation	2,887	3,147	261	9%
72	Accommodation and Food Services	17,697	19,186	1,489	8%
81	Other Services (except Public Administration)	20,123	21,455	1,331	7%
90	Government	38,670	37,969	(700)	(2%)
99	Unclassified Industry	397	482	85	21%
		261,178	275,390	14,212	5.44%

Source: LightCast 2025, 2035

K. The Aerospace Industry

Aerospace is part of the manufacturing sector (NAICS 31-33). It includes NAICS codes 332: Fabricated Metal Product Manufacturing and 336: Transportation Equipment Manufacturing. NAICS 336400 - Aerospace Product and Parts Manufacturing is a “national industry” classification comprising establishments primarily engaged in one or more of the following: (1) manufacturing complete aircraft, missiles, or space vehicles; (2) manufacturing aerospace engines, propulsion units, auxiliary equipment or parts; (3) developing and making prototypes of aerospace products; (4) aircraft conversion (i.e., major modifications to systems); and (5) complete aircraft or propulsion systems overhaul and rebuilding (i.e., periodic restoration of aircraft to original design specifications).

Miami-Dade County’s aerospace industry is concentrated in three national industry classifications, NAICS 336412 - Aircraft Engine and Engine Parts Manufacturing, NAICS 33613 -Other Aircraft Parts and Auxiliary Equipment Manufacturing, and NAICS 33611 - Aircraft Manufacturing. Each industry has shown job growth since 2017.

Miami-Dade’s Aerospace Manufacturing industry has shown significant (161%) job growth since 2017. There are currently 94 aerospace manufacturing establishments employing 2,884 workers (**Table 23**). In South Miami-Dade, there are 13 establishments employing 331 workers (**Table 24**).

Table 23: Miami-Dade Employer Aerospace Product and Part Manufacturing (2025)

6-NAICS	Description	Establishments	Employment	Total Payroll	Average Payroll
336411	Aircraft Manufacturing	20	417	\$32,594,260	\$78,164
336412	Aircraft Engine and Engine Parts Manufacturing	34	1,629	\$151,543,048	\$93,028
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing	37	776	\$56,745,760	\$73,126
336414	Guided Missile and Space Vehicle Manufacturing	2	15	\$2,272,676	\$151,512
336419	Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing	1	47	\$3,480,132	\$74,045
		94	2,884	\$246,635,876	

Source: Quarterly Census of Employment and Wages, 2025

Table 24: South Miami-Dade Employer Aerospace Product and Part Manufacturing (2025)

6_NAICS	Description	Establishments	Employment	Total Payroll	Average Payroll
336411	Aircraft Manufacturing	4	146	\$9,098,932	\$62,321
336412	Aircraft Engine and Engine Parts Manufacturing	3	123	\$9,111,304	\$74,076
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing	6	62	\$5,998,896	\$96,756
		13	331	\$24,209,132	

Source: Quarterly Census of Employment and Wages, 2025

Various aerospace and related occupations have significantly grown in both Miami-Dade County and South Miami-Dade between 2017 and 2025 (**Table 25-26**). In Miami-Dade County, occupations with significant growth include Airfield Operations Specialists (1,421), Commercial Pilots (868), Aircraft Mechanics and Service Technicians (679), Industrial Engineers (635), and Airfield Operations Specialists (317). Meanwhile, South Miami-Dade saw the largest increases in Aircraft Mechanics and Service Technicians (274), Engineers, All Other (161), Commercial Pilots (157), Industrial Engineers (153), and Electrical Engineers (145). The rise in technical occupations - including aircraft mechanics, industrial engineers, and electrical engineers - signals a deepening of the region's maintenance, repair, and overhaul (MRO) capabilities as well as broader engineering and manufacturing support functions.

Table 25: Aerospace and Related Occupations Growth Change, Miami-Dade County (2017-2025)

SOC	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Hourly Earnings	Median Hourly Earnings	Median Annual Earnings
17-2011	Aerospace Engineers	352	315	(37)	(11%)	\$58.40	\$56.98	\$118,522.13
17-2071	Electrical Engineers	552	739	187	34%	\$52.38	\$48.30	\$100,465.29
17-2112	Industrial Engineers	869	1,504	635	73%	\$51.99	\$48.60	\$101,085.79
17-2131	Materials Engineers	45	56	11	24%	\$51.10	\$45.77	\$95,201.99
17-2141	Mechanical Engineers	718	861	143	20%	\$48.01	\$43.28	\$90,021.59
17-2199	Engineers, All Other	691	889	197	29%	\$51.29	\$43.94	\$91,388.26
17-3021	Aerospace Engineering and Operations Technologists and Technicians	133	142	8	6%	\$35.69	\$30.16	\$62,735.23
17-3024	Electro-Mechanical and Mechatronics Technologists and Technicians	26	30	4	17%	\$35.30	\$33.49	\$69,662.16
17-3026	Industrial Engineering Technologists and Technicians	179	184	5	3%	\$27.55	\$24.71	\$51,400.49
17-3027	Mechanical Engineering Technologists and Technicians	104	59	(45)	(43%)	\$33.72	\$33.00	\$68,641.70
19-2021	Atmospheric and Space Scientists	104	99	(6)	(6%)	\$53.11	\$52.40	\$108,984.10
19-2032	Materials Scientists	<10	37	Insf. Data	Insf. Data	\$48.08	\$43.18	\$89,804.59
49-2091	Avionics Technicians	435	536	101	23%	\$40.30	\$39.33	\$81,806.34
49-3011	Aircraft Mechanics and Service Technicians	3,822	4,501	679	18%	\$39.49	\$38.01	\$79,058.11
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	129	226	97	75%	\$27.18	\$27.13	\$56,436.48
51-2028	Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	684	513	(171)	(25%)	\$18.04	\$16.59	\$34,501.07
51-2031	Engine and Other Machine Assemblers	24	70	46	187%	\$22.32	\$23.49	\$48,854.10
53-1041	Aircraft Cargo Handling Supervisors	286	294	8	3%	\$34.13	\$33.39	\$69,456.45
53-2011	Airline Pilots, Copilots, and Flight Engineers	2,541	2,259	(282)	(11%)	\$140.64	\$131.48	\$273,475.64
53-2012	Commercial Pilots	984	1,851	868	88%	\$74.67	\$73.38	\$152,634.38
53-2021	Air Traffic Controllers	408	516	108	26%	\$74.42	\$80.63	\$167,713.41
53-2022	Airfield Operations Specialists	200	1,621	1,421	711%	\$47.24	\$36.78	\$76,504.52
53-6032	Aircraft Service Attendants	563	880	317	56%	\$20.90	\$19.77	\$41,126.52

Source: LightCast 2017, 2025

Table 26: Aerospace and Related Occupations Growth Change, South Miami-Dade (2017-2025)

SOC	Description	2017 Jobs	2025 Jobs	2017 - 2025 Change	2017 - 2025 % Change	Avg. Hourly Earnings	Median Hourly Earnings	Median Annual Earnings
17-2011	Aerospace Engineers	50	40	(10)	(19%)	\$58.60	\$57.20	\$118,965.62
17-2071	Electrical Engineers	120	145	25	21%	\$52.36	\$48.34	\$100,555.38
17-2112	Industrial Engineers	116	153	38	33%	\$52.00	\$48.54	\$100,968.98
17-2131	Materials Engineers	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
17-2141	Mechanical Engineers	108	123	14	13%	\$48.58	\$43.34	\$90,140.81
17-2199	Engineers, All Other	136	161	25	19%	\$51.07	\$43.91	\$91,343.08
17-3021	Aerospace Engineering and Operations Technologists and Technicians	13	13	1	5%	\$35.83	\$30.16	\$62,735.71
17-3024	Electro-Mechanical and Mechatronics Technologists and Technicians	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
17-3026	Industrial Engineering Technologists and Technicians	26	20	(6)	(22%)	\$27.73	\$24.59	\$51,144.83
17-3027	Mechanical Engineering Technologists and Technicians	15	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
19-2021	Atmospheric and Space Scientists	17	19	2	14%	\$53.24	\$52.62	\$109,456.36
19-2032	Materials Scientists	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
49-2091	Avionics Technicians	34	41	8	22%	\$42.25	\$40.73	\$84,722.23
49-3011	Aircraft Mechanics and Service Technicians	210	274	65	31%	\$40.72	\$39.03	\$81,190.24
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
51-2028	Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	89	62	(28)	(31%)	\$18.11	\$16.55	\$34,417.77
51-2031	Engine and Other Machine Assemblers	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
53-1041	Aircraft Cargo Handling Supervisors	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
53-2011	Airline Pilots, Copilots, and Flight Engineers	67	91	24	35%	\$144.27	\$133.24	\$277,147.37
53-2012	Commercial Pilots	81	157	76	94%	\$75.36	\$74.12	\$154,166.43
53-2021	Air Traffic Controllers	139	157	18	13%	\$74.38	\$80.62	\$167,699.66
53-2022	Airfield Operations Specialists	13	101	88	689%	\$47.32	\$36.81	\$76,571.21
53-6032	Aircraft Service Attendants	11	41	30	259%	\$21.00	\$19.82	\$41,229.84

Source: LightCast 2017, 2025

In 2024, the Homestead Air Reserve Base (HARB) and surrounds were designated as a “Spaceport Territory” by the Florida Legislature. Currently, only the Cape Canaveral Spaceport (CCS) Launch and Landing Facility, Cecil Spaceport in Jacksonville, and the Space Coast Spaceport in Titusville are FAA licensed. Spaceport is evaluating how the recently designated Homestead Air Reserve Base (HARB) and Tyndall Air Force Base on the Florida Panhandle can be incorporated and best leverage the state spaceport system. Space Florida is focused on maximizing investment, operational efficiency and critical infrastructure challenges.

For South Miami-Dade to take advantage of the HARB Spaceport Territory designation and grow its aerospace industry, foundational capacity-building will need to be strategized. Capacity-building should focus on four areas of opportunity and improvement: land use planning, robust infrastructure and utilities, a skilled workforce, and strong partnerships.

- ***Land use planning*** – land use planning for aerospace manufacturing prioritizes siting facilities near airports and spaceports and logistics hubs with compatible zoning. Key strategies include developing shovel-ready sites. Local governments often use comprehensive plans to zone surrounding land for light or heavy industrial use that supports the aviation industry, such as aviation parts, maintenance, and logistics. South Miami-Dade has a limited amount of industrial land, but there exists a large area of vacant land within the Spaceport Territory owned by Miami-Dade County that already has been targeted for potential aerospace manufacturing. There is also a scattering of commercial land throughout South Miami-Dade that may be suitable for aerospace uses.
- ***Robust infrastructure and utilities*** – aerospace development requires providing robust infrastructure and utilities planning. Site development costs often present public infrastructure challenges especially water and sewer, access roads and the overall surrounding road network. Utilities include electric power, natural gas and municipal water and wastewater. Planning should include high-capacity power for advanced manufacturing, specialized transport, and fiber connectivity.
- ***Skilled workforce*** – growing and locating aerospace manufacturing in a region requires an ample supply of skilled and highly skilled workers. Aerospace manufacturers and their suppliers need locations with a robust talent pool and efficient supply chain network. Aerospace manufacturing’s higher salaries and wages rank substantially above the national average and can jump-start economic prosperity for the entire region.
- ***Strong partnerships*** – Building ecosystems for the growth of South Miami-Dade's Aerospace Industry will require cultivating partnerships between private industry and government and extend to academia and research institutions, particularly for training the future workforce. The ecosystem of institutions must include universities, community colleges, and trade schools. Highly efficient public-private partnerships will need to play a key role in ensuring successful outcomes for private investment in Aerospace and government support for critical infrastructure investment.

Appendices

Appendix A: Advanced Industry Employer Establishment Counts and Employment, Miami-Dade (2025)

4-Digit	Description	Establishments	Employment	Total Payroll	Average Payroll
5416	Management, Scientific, and Technical Consulting Services	6,831	22,481	\$2,732,945,524	\$121,567
5413	Architectural, Engineering, and Related Services	1,733	12,997	\$1,227,046,656	\$94,410
5415	Computer Systems Design and Related Services	2,541	12,758	\$2,067,926,300	\$162,089
6215	Medical and Diagnostic Laboratories	277	3,118	\$208,092,452	\$66,739
3364	Aerospace Product and Parts Manufacturing	94	2,884	\$246,635,876	\$85,519
5417	Scientific Research and Development Services	477	2,797	\$387,781,060	\$138,642
2211	Electric Power Generation, Transmission and Distribution	79	2,458	\$327,270,092	\$133,145
3399	Other Miscellaneous Manufacturing	228	2,288	\$123,360,372	\$53,916
5182	Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services	361	2,150	\$496,854,180	\$231,095
3254	Pharmaceutical and Medicine Manufacturing	77	2,147	\$164,857,872	\$76,785
3391	Medical Equipment and Supplies Manufacturing	169	1,747	\$196,914,964	\$112,716
3366	Ship and Boat Building	65	1,435	\$91,594,632	\$63,829
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	71	917	\$89,746,156	\$97,869
3339	Other General Purpose Machinery Manufacturing	55	505	\$32,833,420	\$65,017
3363	Motor Vehicle Parts Manufacturing	33	430	\$34,826,956	\$80,993
3342	Communications Equipment Manufacturing	37	364	\$29,821,564	\$81,927
3353	Electrical Equipment Manufacturing	19	318	\$16,070,312	\$50,536
3351	Electric Lighting Equipment Manufacturing	27	261	\$15,409,072	\$59,039
3362	Motor Vehicle Body and Trailer Manufacturing	18	246	\$13,138,752	\$53,410
3279	Other Nonmetallic Mineral Product Manufacturing	34	228	\$13,834,212	\$60,676

Source: Quarterly Census of Employment and Wages, 2025

Appendix B: South Miami-Dade Zip Codes

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Appendix C: Means of Transportation to Work South Miami-Dade (2017-2024)

	Workers 16 years and over	Public transportation	Walked or Biked	Taxicab, motorcycle, or other means	Workers 16 years and over	Public transportation	Walked or Biked	Taxi or ride- hailing ,motorcycle, or other	Public transportation	Walked or Biked	Taxi or ride- hailing ,motorcycle, or other
	2017				2024				% Point Change 2017-2024		
Town of Cutler Bay	22,195	2.90%	0.80%	1.60%	22,441	1.20%	0.40%	2.40%	-1.7	-0.4	0.8
Florida City	3,910	10.20%	2.60%	5.00%	4,388	4.80%	0.20%	1.30%	-5.4	-2.4	-3.7
Homestead	27,723	6.70%	1.40%	1.60%	37,804	2.10%	1.10%	1.70%	-4.6	-0.3	0.1
Village of Palmetto Bay	11,417	2.60%	0.30%	0.90%	12,353	2.60%	1.10%	3.60%	0	0.8	2.7
Village of Pinecrest village	9,179	6.50%	0.70%	1.30%	8,455	3.00%	1.30%	1.20%	-3.5	0.6	-0.1
<i>Census Designated Places (Unincorporated)</i>											
Country Walk CDP	7,702	1.80%	0.00%	1.30%	10,087	0.70%	0.40%	1.10%	-1.1	0.4	-0.2
Goulds CDP	3,944	4.70%	1.00%	4.70%	6,184	3.30%	2.30%	0.10%	-1.4	1.3	-4.6
Homestead Base CDP	121	14.90%	42.20%	0.00%	141	20.60%	22.70%	0.00%	5.7	-19.5	0
Kendall CDP	38,247	4.00%	1.50%	0.60%	39,445	3.40%	1.60%	1.90%	-0.6	0.1	1.3
Leisure City CDP	10,417	5.20%	0.50%	1.40%	11,756	1.90%	0.40%	2.10%	-3.3	-0.1	0.7
Naranja CDP	3,879	5.60%	0.00%	0.40%	6,914	2.40%	0.30%	1.70%	-3.2	0.3	1.3
Palmetto Estates CDP	7,484	9.00%	1.00%	2.70%	7,510	2.10%	0.00%	2.60%	-6.9	-1	-0.1
Princeton CDP	12,140	3.60%	0.50%	2.10%	20,930	2.80%	0.80%	1.50%	-0.8	0.3	-0.6
Richmond Heights CDP	5,070	13.20%	0.00%	3.20%	4,876	2.80%	0.00%	3.70%	-10.4	0	0.5
Richmond West CDP	18,695	2.30%	0.60%	1.00%	17,441	1.30%	0.30%	1.30%	-1	-0.3	0.3
South Miami Heights CDP	17,709	3.70%	1.10%	2.40%	18,145	1.80%	0.30%	1.20%	-1.9	-0.8	-1.2
The Crossings CDP	11,409	2.00%	0.70%	1.60%	12,090	0.60%	0.30%	1.40%	-1.4	-0.4	-0.2
The Hammocks CDP	30,004	2.60%	1.60%	1.50%	30,005	1.60%	0.50%	2.00%	-1	-1.1	0.5
Three Lakes CDP	8,484	2.20%	0.40%	0.80%	9,172	0.90%	1.20%	1.30%	-1.3	0.8	0.5
West Perrine CDP	4,040	8.00%	0.00%	3.20%	4,864	2.20%	0.30%	7.70%	-5.8	0.3	4.5
South Miami-Dade	253,769	4.26%	0.99%	1.56%	285,001	2.13%	0.79%	1.90%	-2.1	-0.2	0.3
Miami-Dade County	1,251,193	5.20%	2.70%	1.40%	1,356,445	3.30%	2.50%	2.30%	-1.9	-0.2	0.9

Source: U.S. Census Bureau, 2017 and 2024 American Community Survey 5-Year Estimates