



Regional Development Strategy for Aviation

Prepared by Ernst & Young LLP for the CVG Airport
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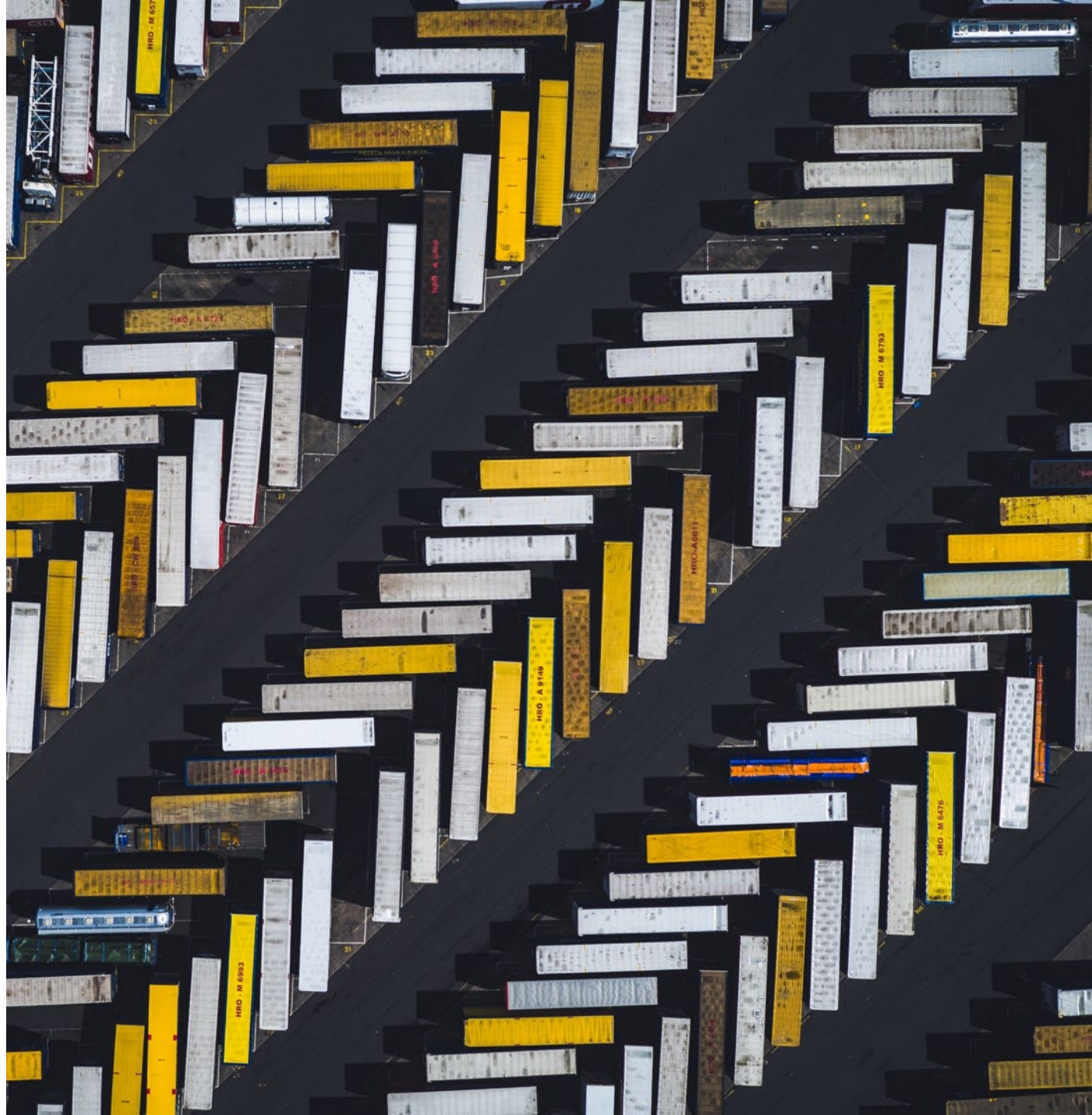
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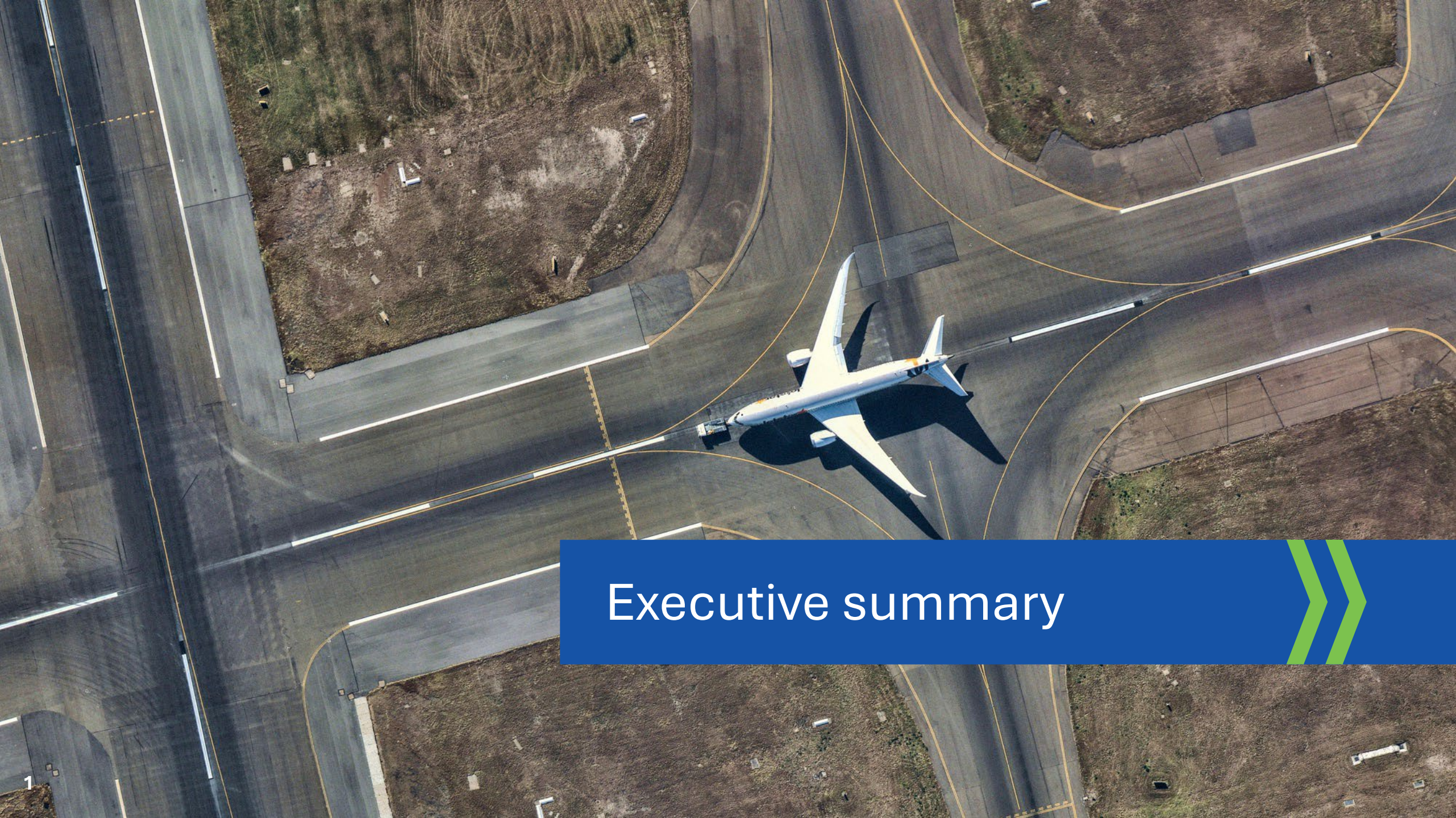
Acknowledgements

Strategy Participants

This Strategy was produced over approximately 6 months, with participation from an Advisory Group comprised of airport leadership, economic development professionals, and EY. Below lists the entities engaged in guiding the strategy throughout the process.

- ▶ BE NKY Growth Partnership
- ▶ CVG Airport Authority
- ▶ Dayton Development Coalition
- ▶ Dayton International Airport
- ▶ Greater Louisville Inc.
- ▶ Louisville Alliance
- ▶ Louisville Muhammad Ali International Airport
- ▶ REDI Cincinnati



An aerial photograph of an airport tarmac. A white commercial airplane is parked on a dark asphalt surface, oriented diagonally. Several ground crew members in high-visibility vests are visible around the aircraft. A small service vehicle is positioned near the tail of the plane. The tarmac is bordered by yellow and white painted lines. In the background, there are patches of dry, brownish grass and some airport infrastructure.

Executive summary



Executive summary

Global hub for moving people and products

The Cincinnati/Northern Kentucky-Dayton-Louisville region of the I-71/I-75 Corridor is at the forefront of transforming how people and products are moved more efficiently, effectively and sustainably.

In 2023, companies in the region's thriving aerospace, supply chain and logistics sector contributed nearly \$26b to the region's gross domestic product (GDP) and 195k jobs to the labor market. With one of the largest and fastest growing cargo airports in North America, lower cost of living compared to other logistics hubs and fifty percent of the U.S. population within 600 miles, the region is well positioned to compete effectively for future investment in the aviation economy.

To capitalize on the region's opportunity to attract investment and shape the future of the aerospace, supply chain and logistics sector by working together, leaders from the region's airports and economic development organizations have created this strategy to organize efforts in:

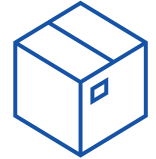
- ▶ Industry engagement
- ▶ Talent development
- ▶ Marketing
- ▶ Innovation

This plan is a call to action to understand the opportunity and mobilize people and resources to take the first steps.



Aerospace Product & Parts Manufacturing

\$4.4b GDP (2023)
16% growth (2018-23)
14k jobs (2023)



Couriers and Express Delivery Services

\$4.5b GDP (2023)
49% growth (2018-23)
41k jobs (2023)



Freight Transportation

\$7.1b GDP (2023)
64% growth (2018-23)
48k jobs (2023)



Warehousing

\$3.1b GDP (2023)
72% growth (2018-23)
50k jobs (2023)

Selected industries in the aerospace, supply chain and logistics sector in Cincinnati/Northern Kentucky-Dayton-Louisville

Source: Lightcast



About the process





About the process



Shaping the future of the aviation economy

Representatives of the various airports and economic development organizations operating in the Cincinnati/Northern Kentucky-Dayton-Louisville corridor convened a series of meetings in the fall of 2024 to explore collaborative opportunities for advancing the region's aviation economy, focusing on aerospace, supply chain and logistics.

Participating organizations included:

- Cincinnati/Northern Kentucky International Airport
- Dayton International Airport
- Louisville Muhammad Ali International Airport
- BE NKY
- Dayton Development Coalition
- Greater Louisville Inc.
- Louisville Economic Development Alliance
- REDI Cincinnati

This advisory group worked with EY's Economic Development Advisory Services practice to inventory the region's aerospace, supply chain and logistics assets, quantify the industry's economic impact in the region and identify approaches to coordinated business development.

Strengthening regional collaboration

Cincinnati/Northern Kentucky, Dayton and Louisville each bring unique strengths to the overall value proposition of the corridor to industries in the target sector of aerospace, supply chain and logistics.

Dayton is a national leader in advanced air mobility.

Cincinnati/Northern Kentucky is a globally recognized center of innovation in aircraft engine and engine parts manufacturing, with one of the largest concentrations of employees in the country. And Louisville is a key logistics hub, with a growing specialization in the movement of healthcare products.

Based on input collected through interviews with more than twenty organizations involved in some aspect of the target sector, the advisory group determined that enhanced coordination would complement the efforts of individual organizations, especially in the areas of marketing, advocacy and talent development. Stakeholders agreed, for example, that having a "common set of facts" to demonstrate why the corridor is an attractive location for future investment would benefit everybody, no matter where in the region a project might land.

This document frames opportunities for what that collaboration across the Cincinnati/Northern Kentucky-Dayton-Louisville corridor might look like, and how the regional economy could benefit.

Trends shaping the industry and the region's opportunities

Several megatrends and disruptors are expected to have continued impact on the Aerospace, Supply Chain and Logistics sector



Continued onshoring and multi-sourcing to strengthen supply chains and optimize fleet maintenance



Accelerated rates of digitization and the adoption of advanced technologies, plus enhanced focus on data security and compliance



New innovations to support global commitments to sustainability and the expanding markets of space commercialization and advanced air mobility



Talent challenges compounded by advanced skills needs and an aging workforce

How can the region seize the moment?

- ▶ Promoting existing sector excellence and available infrastructure for continued growth
- ▶ Highlighting the lower costs of operation and access to populations, customers and suppliers
- ▶ Focusing on investments in the talent pipeline to support technical needs, the digital transformation and increasingly aging workforce
- ▶ Aligning the innovation capacities of the broader region, both from legacy employers, universities, venture development organizations and startups



The region's assets



This region is transforming how companies move people and products more efficiently, effectively and sustainably.

This includes the industries and related suppliers of aerospace and advanced air mobility companies and service providers engaged in advanced supply chain, maintenance and fleet management.



The region's strengths

Regional strengths

Thriving industry:

- ▶ 8k companies employing 190k workers
- ▶ 500+ foreign-owned companies
- ▶ 9th-largest market for sector nationally
- ▶ 40% sector GDP growth, 2018-2023
- ▶ #1 ranked for lowest cost of living

Sector leader

#1

Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing
\$1.1b industry, 21% U.S. market share, 6.5k jobs

#2

Aircraft Engine and Engine Parts Manufacturing
\$3.6b industry, 16% U.S. market share, 11.3k jobs

#2

Scheduled Freight Air Transportation
\$354m industry, 10% U.S. market share, 2.4k jobs

A growing, globally connected economy:

- ▶ 5m population
- ▶ \$364b regional economy (GDP)
- ▶ 26% GDP growth, 2018-2023
- ▶ 13 Fortune 1000 companies
- ▶ 35k foreign-owned firms

Key assets

Leading cargo airport: CVG is currently the #12 busiest cargo airport in the world and #6 busiest cargo airport in the U.S.

Global leaders in supply chain and logistics: Amazon Air Hub, DHL Global Super Hub for the Americas, FedEx, UPS, and others

Global leaders in aerospace: GE Aviation, Northrop Grumman, Lockheed Martin, Raytheon, US Department of Defense, NASA, FAA, hundreds of suppliers and service providers

Strong partners in innovation : The University of Cincinnati UAV Lab, Wright Patterson Air Force Base, University of Dayton Research Institute, GE Aviation EPISCENTER

Unique strengths

Cincinnati

- ▶ Cincinnati is home to the #1 largest inland port in the nation
- ▶ Aerospace manufacturing contributes \$4b to regional GDP

Dayton

- ▶ Dayton's military and federal installations account for more than \$19b in economic activity
- ▶ Defense-related activities and investment support 100k+ jobs
- ▶ Defense-related activities and investment account for 17% of the regional economy

Louisville

- ▶ UPS Worldport processes more than 400k packages per hour
- ▶ Products can reach more than 80% of the global population within 24 hours

Northern Kentucky

- ▶ 2 cargo hubs at CVG (DHL and Amazon)
- ▶ 6th busiest cargo airport in the U.S.
- ▶ 55+ nonstop destinations from CVG
- ▶ In 2022, CVG had a \$9.3 billion annual economic impact

Selected regional assets

Companies, airports, R&D and education assets fueling growth of aerospace, supply chain and logistics



Companies

- 1 Aerotech of Louisville Inc
- 2 Airlines Reporting Corporation
- 3 Alliant Technologies
- 4 Amazon Fulfillment Center Prime Air
- 5 Andrews Laser Works Aerostructures
- 6 Atlas Air Worldwide Holdings
- 7 BAE Systems
- 8 Barnes Aero
- 9 Beta Technologies
- 10 Blum-Novotest Inc
- 11 Bosch Rexroth
- 12 Burdine-Anderson Inc
- 13 Celanese
- 14 CFM
- 15 CTL Aero
- 16 DESMA USA
- 17 DHL
- 18 Diversified Structural Composites Inc
- 19 FEAM Aero
- 20 Fives Machining Systems Fives Cin.
- 21 Ford/BlueOval SK
- 22 GE Aerospace
- 23 GE Aviation
- 24 GE Aviation
- 25 GE On Wing Support Div
- 26 General Tool
- 27 Goodrich/Collins Aero
- 28 Heroux-Devtec
- 29 Honda LGES
- 30 Honeywell Aerospace
- 31 IMR Test Labs Louisville
- 32 Joby Aviation
- 33 L3Harris
- 34 L3Harris
- 35 Magellan



Companies, continued

- 36 Meggitt Polymers & Composites
- 37 Meyer Tool
- 38 Mitsubishi Electric
- 39 Northrup Grumman
- 40 Parker Hannifin
- 41 Raytheon
- 42 Republic Airline Maintenance
- 43 Safran
- 44 Saint-Gobain Quartz USA
- 45 Satco Inc of Ky
- 46 Sierra Nevada Corporation
- 47 Skilcraft Aerospace LLC
- 48 Toyota
- 49 UPS
- 50 UPS Global Ops
- 51 UPS Worldport
- 52 Zotefoams
- 53 ATSG



Airports

- 1 CVG Airport
- 2 DAY Airport
- 3 SDF Airport
- 4 SGH Municipal Airport
- 5 Wright-Patterson AFB
- 6 Wilmington Airport



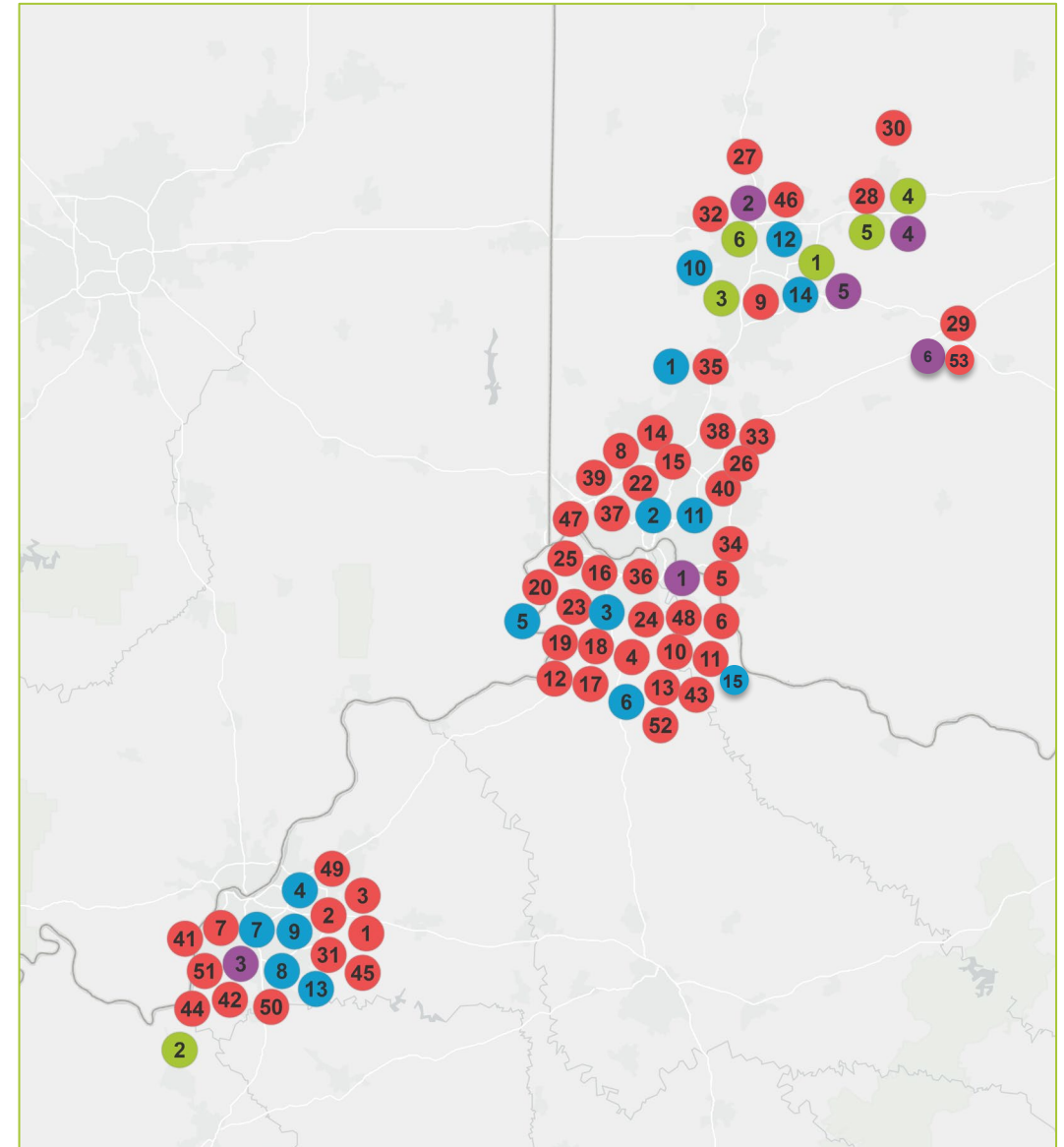
R&D

- 1 Air Force Research Laboratory
- 2 Fort Knox
- 3 GE Aerospace EPISCenter
- 4 Ohio Uncrewed Aircraft Systems Ctr.
- 5 SNC Aviation Innovation & Tech Center
- 6 Wright Brothers Institute



Education

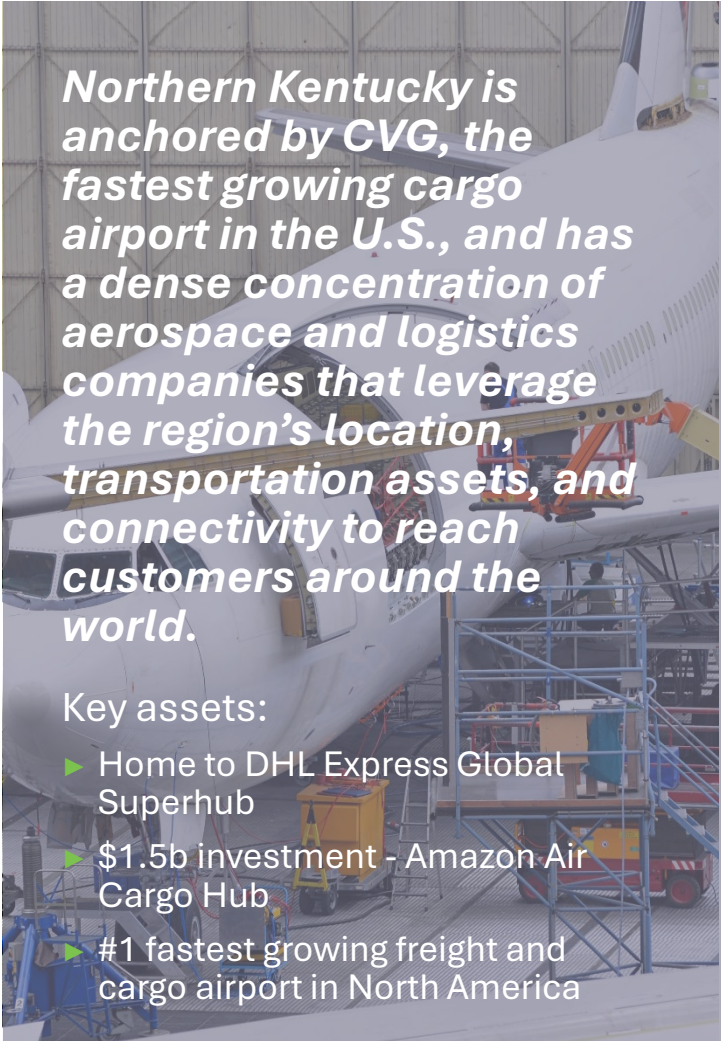
- 1 Butler Tech
- 2 Cincinnati State
- 3 Epic Flight Academy
- 4 Flight Club 502
- 5 FlightSafety International Learning Center
- 6 Gateway Community & Technical College
- 7 Jefferson Community & Technical College
- 8 Jefferson County Public Schools Acad. of Louisville
- 9 Louisville Aviation
- 10 Sinclair CC National UAS Training & Certification Center
- 11 University of Cincinnati
- 12 University of Dayton
- 13 UPS Global Aviation Training Center
- 14 Wright State Research Institute
- 15 Northern Kentucky University



Source: ESRI, Dun and Bradstreet, EY. *Approximate location for readability.

Northern Kentucky

A major center of air cargo logistics and e-commerce



Northern Kentucky is anchored by CVG, the fastest growing cargo airport in the U.S., and has a dense concentration of aerospace and logistics companies that leverage the region's location, transportation assets, and connectivity to reach customers around the world.

Key assets:

- ▶ Home to DHL Express Global Superhub
- ▶ \$1.5b investment - Amazon Air Cargo Hub
- ▶ #1 fastest growing freight and cargo airport in North America

Industry

Aerospace:

- ▶ Andrew Laser Works
- ▶ Atlas Air
- ▶ Avenir Aviation
- ▶ Blum-Novotest
- ▶ Bodycote
- ▶ Celanese
- ▶ DESMA USA
- ▶ DHL Express Global Superhub
- ▶ GE Aerospace, Engine Services
- ▶ GE Aerospace, On Wing Support
- ▶ JAVAD GNSS
- ▶ KRC Machine Tool Solutions
- ▶ Mazak
- ▶ Parket Meggitt
- ▶ Safran Landing Systems
- ▶ Skilcraft Aerospace
- ▶ VSE Aviation Services

Supply Chain & Logistics:

- ▶ Amazon
- ▶ Ancra Cargo
- ▶ Armor USA
- ▶ BM2 Freight Services
- ▶ DHL North America
- ▶ FedEx Ground Package System
- ▶ Hy-Tek Intralogistics
- ▶ Lighthouse Transportation Services
- ▶ M&P Logistics
- ▶ MegaCorp Logistics
- ▶ Signode
- ▶ Steinhauser
- ▶ Summit Packaging Solutions
- ▶ Total Quality Logistics
- ▶ UPS Supply Chain Solutions
- ▶ Zumbiel Packaging

Talent/Innovation

- ▶ Gateway Community & Technical College Advanced Manufacturing Technician Program
- ▶ FlightSafety International Cincinnati Learning Center
- ▶ NKY FAME Apprentice program
- ▶ Epic Flight Academy
- ▶ Supply Chain OKI
- ▶ NKU
 - ▶ BS – Global Supply Chain Management

Cincinnati, Ohio

A center for aircraft engine and parts manufacturing



Cincinnati is home to leading aerospace and aviation manufacturers, with key assets like GE Aerospace headquarters, hundreds of Tier 1 and Tier 2 suppliers and an extensive education system making it an ideal location for aircraft engine and parts manufacturing.

Key assets:

- ▶ GE Aerospace HQ
- ▶ AeroHub
- ▶ 18k+ workers in aerospace manufacturing

Industry

Aerospace:

- ▶ Barnes Aerospace
- ▶ Bosch
- ▶ CFM International
- ▶ Cincinnati Test Systems
- ▶ CTL Aerospace, Inc.
- ▶ GE Aerospace
- ▶ General Tool
- ▶ Jet Machine
- ▶ L3Harris
- ▶ Magellan Aerospace
- ▶ Makino
- ▶ Meyer Tool
- ▶ Milacron
- ▶ Mitsubishi Electric
- ▶ Parker Aerospace
- ▶ Rhinestahl
- ▶ Veelo Technologies

Supply Chain & Logistics :

- ▶ Aero Fulfillment Services
- ▶ Brendamour Warehousing
- ▶ Crescent
- ▶ DHL
- ▶ FedEx
- ▶ Hayneedle
- ▶ Hub Group
- ▶ Veritiv

Talent/Innovation

- ▶ University of Cincinnati
 - ▶ Aerospace engineering
 - ▶ Unmanned Aerial Vehicle Multi-Agent Systems Tech Research Lab (UAV Master)
 - ▶ Center for Intelligent Propulsion and Advanced Life Management
 - ▶ Next Engineers (GE)
- ▶ Cincinnati State
 - ▶ Aviation certificates (4)
- ▶ Butler Tech

Dayton, Ohio

The future of advanced air mobility and defense

Dayton's legacy of flight began with the Wright Brothers and continues today with the Wright-Patterson Air Force Base and Springfield Air National Guard Base, making Dayton a national leader in aerospace, air mobility and defense research and education.

Key assets:

- ▶ Wright Patterson Air Force Base & Springfield Air National Guard Base
- ▶ Dayton International Airport
- ▶ Extensive research and education in air mobility and defense

Industry

Aerospace:

- ▶ ARCTOS
- ▶ BETA Technologies
- ▶ Collins Aerospace
- ▶ Crown Equipment
- ▶ Dayton Aerospace
- ▶ Héroux-Devtek Inc. (HDI)
- ▶ Honeywell Aerospace
- ▶ Honda/LGES
- ▶ Joby Aviation
- ▶ PSA Airlines
- ▶ Sierra Nevada Corporation
- ▶ TACG
- ▶ Trimble Navigation
- ▶ Woolpert

Supply Chain & Logistics:

- ▶ Amazon
- ▶ Cordell Transportation
- ▶ Dayton Freight
- ▶ Dayton Logistics
- ▶ Gabe's
- ▶ ODW Logistics
- ▶ Proctor & Gamble

Talent/Innovation

- ▶ Air Force Research Laboratory
- ▶ AFWERX (AFVentures, Spark, Prime and SpaceWERX)
- ▶ National Advanced Air Mobility Center of Excellence
- ▶ University of Dayton
- ▶ UDRI + onMain Innovation Hub: Air Force digitization R&D
- ▶ GE Aerospace Electrical Power Integrated Systems Center (EPISCENTER)
- ▶ Sinclair UAS Training & Certification Center
- ▶ Wright State Research Institute
- ▶ Ohio Uncrewed Aircraft Systems Center
- ▶ SNC Aviation Innovation & Tech Center
- ▶ Wright Brothers Institute
- ▶ Wright State Research Institute

Louisville, Kentucky

A logistics hub advancing healthcare innovations

Louisville has long been a logistics and supply chain hub because of its extensive air, road, and rail connectivity. Recent innovations in healthcare logistics are solidifying the area's reputation as a national leader in logistics and supply chain.

Key assets:

- ▶ GLI's Advanced Manufacturing & Logistics Network
- ▶ UPS Worldport
- ▶ UPS Healthcare

Industry

Aerospace:

- ▶ Aerotech of Louisville
- ▶ Aeronet Worldwide
- ▶ Air to Ground Services Inc.
- ▶ Airlines Reporting Company
- ▶ Alliant Technologies
- ▶ BAE Systems
- ▶ Ford/BlueOval SK
- ▶ IMR Test Labs
- ▶ Raytheon
- ▶ Republic Airways Maintenance
- ▶ Satco Inc.

Supply Chain & Logistics:

- ▶ Advanced Distributions Services
- ▶ Bluegrass Supply Chain
- ▶ Derby Supply Chain Solutions
- ▶ C J International
- ▶ Escatena Group LLC
- ▶ Mercer Transportation
- ▶ Premier Packaging
- ▶ Running Ox Logistics
- ▶ Saint Gobain Composites
- ▶ Satco Inc.
- ▶ UPS

Talent/Innovation

- ▶ UPS Global Aviation Training Center
- ▶ Jefferson Community & Technical College Aviation Maintenance Technology program
- ▶ JCPS Academies of Louisville
- ▶ Aerospace Engineering
- ▶ Aircraft Maintenance Tech
- ▶ Flight and Aeronautics
- ▶ Flight Club 502
- ▶ Louisville Aviation
- ▶ University of Louisville



A call to action

A call to action: Let's lead the future!

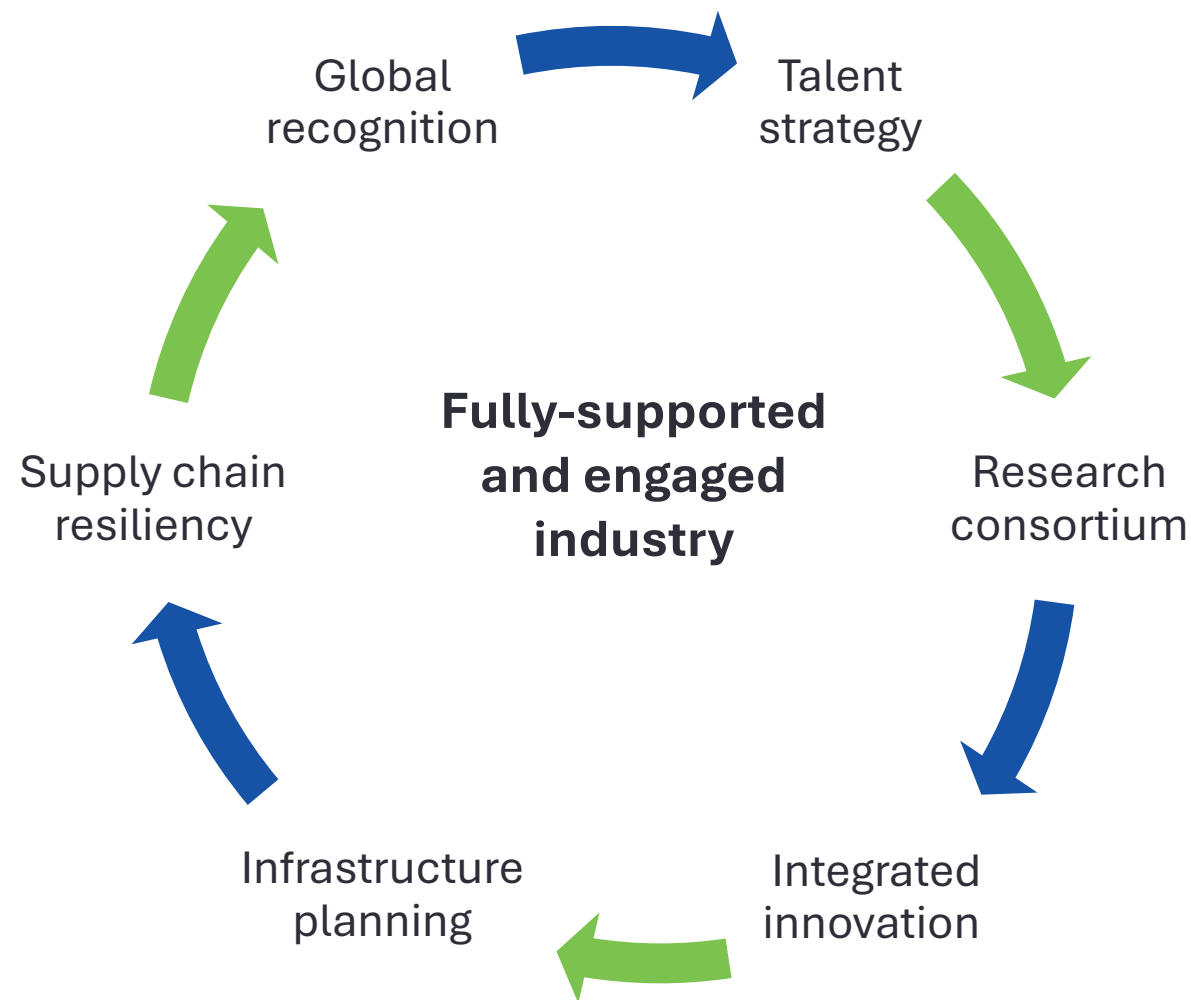
Imagine the possibilities if the region was aligned to fully support and engage this industry

The depth and breadth of industry assets in this broader region is undeniable. A fully-engaged industry council, supported by partners across a spectrum of competitiveness areas, provides the platform for aligning these many assets in securing the region's global leadership for decades to come.

This council could serve as a platform for initiatives such as:

- ▶ Concerted efforts to raise global recognition
- ▶ Regional approach to building out the supply chain
- ▶ Shared career pathway platform and talent strategy
- ▶ Consortium of research partners in key areas
- ▶ Plans for accelerating adoption of local research and innovations
- ▶ Planning infrastructure investments from sites to testing corridors

These and more could be possible with all partners working as one.



Establishing an industry council

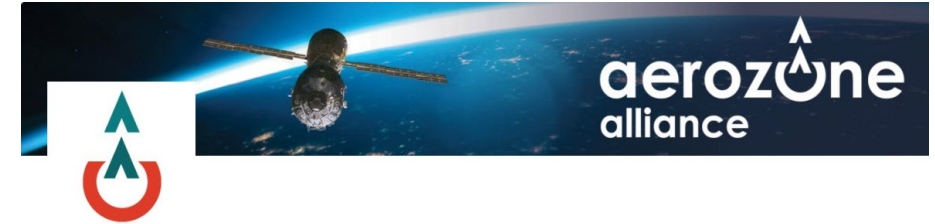
An industry council can be the platform to support continued growth and leadership in the industry. While economic developers are well equipped to convene partners around a common cause, leadership must come from the private sector for a regional effort like this to be successful and sustainable. It must be compelling enough for industry leaders to invest time and resources in it.

In setting the table to convene industry and partners:

- ▶ Focus initially on industry engagement. Explain the goal of building the Cincinnati/Northern Kentucky-Dayton-Louisville corridor into a globally recognized hub for aerospace, supply chain and logistics.
- ▶ Leverage economic development teams' relationships to identify council members and assemble the group. Keep it narrowly defined to the target sector.
- ▶ Educate them on this process and opportunities to gain buy-in. If buy-in exists, discuss frequency of meetings, goals and resources.
- ▶ Identify 1-2 opportunities then assemble partners and resources.

Meaningful progress is essential to continued engagement!

Industry council example:



- ▶ [Aerozone Alliance](#) is a network of partners advancing growth, talent, innovation and infrastructure in NEO (8 cities). Anchors include the NASA Glenn Research Center, CLE Airport, Baldwin Wallace University, I-X Center, Forward Innovation Center and others.
- ▶ Main activities: federal grant pursuits, marketing, business retention and expansion visits, advocacy, Energy Summit, Smart Job Fair, STEM initiatives.
- ▶ Relevant example of a target sector consortium with similar [focus areas](#) and [priorities](#) but a much smaller geographic footprint.
- ▶ Revenue: \$514k (2023) [Form 990](#)

Building the talent pipeline

Economic development is a competitive industry, but talent is the common denominator that every region competing for investment needs to attract and retain companies. Similarly, companies may compete for talent, but increasing the size of the overall talent pool in a region benefits everybody.

For this regional effort to succeed, education and workforce programs must be aligned, with sufficient engagement from industry to help inform, fund, adopt and implement them.

Getting started:

- ▶ Use the industry council to inform and prioritize the most pressing workforce needs.
- ▶ Convene education and workforce training partners by segment of the talent pipeline.
- ▶ Identify scalable workforce development initiatives and the resources necessary to do so.
- ▶ Engage industry to implement programs and adjust as necessary as needs evolve.

Initiatives discussed:

- ▶ Explore creating a digital platform to promote target sector career opportunities and pathways
Example: **MAKE IT** MOVEMENT.ORG
- ▶ Explore the feasibility of replicating the target sector relevant JCPS Academies of Louisville regionwide:
 - ▶ Aerospace Engineering
 - ▶ Aircraft Maintenance Tech
 - ▶ Flight and Aeronautics
- ▶ Leverage industry council to inform curriculum and equipment needs
- ▶ Ensure that key occupations and skill sets are listed as priorities in federal and state funding plans (e.g., comprehensive economic development strategies)
- ▶ Mobilize industry involvement in aviation/robotics clubs and camps and increase access regionwide
- ▶ Explore ways to streamline processes for internships, apprenticeships, teacher externships, facility tours

Launching collaborative marketing efforts

Stakeholders reported that collaborative marketing would be among the most valuable aspects of this new regional effort, as well as one of the easiest areas to get started.

While each airport and economic development organization involved in this effort will continue its individual marketing and business development efforts based on local priorities, there was strong consensus that a united front articulating the region's "right to win" in aerospace, supply chain and logistics benefits everybody.

Getting started:

- ▶ Between the information already packaged by economic development organizations in the corridor and the asset inventory and data produced for this project, the region has most of what it needs to create a compelling public presence using digital and other types of media.
- ▶ CVG has agreed to take the lead on implementation but populating and updating marketing materials will need firm commitment from all project partners.

Initiatives discussed:

- ▶ Create digital and other types of marketing assets with consistent messaging explaining the region's target sector assets and aspirations. Each area of the region—Cincinnati/Northern Kentucky, Dayton, Louisville—brings something unique to the picture. Balance the regional business case with the local differentiators in the messaging.
- ▶ Provide a single point of contact who can act as the coordinator for the regional collaboration.
- ▶ Present a united front at major international shows (e.g., Farnborough, Paris Air Show) to demonstrate the commitment to regional collaboration and use marketing resources efficiently.
- ▶ Explore a single, shared contract to generate business attraction leads based on events, geographies or select industries.
- ▶ Explore the feasibility of an MOU between airports and economic development organizations to share leads and insights from industry interactions.
- ▶ Explore joint advocacy at state and federal levels.

Igniting innovation opportunities

The Cincinnati/Northern Kentucky-Dayton-Louisville region is at the forefront of advanced research across a variety of technological areas and markets in aerospace, supply chain and logistics. Industry-university partnerships are active in advanced air mobility, cyber physical systems, sustainable aviation fuel (SAF) and many others.

The region's combination of large anchor employers to drive investment in R&D partnerships and specialized programs in higher education institutions relevant to aerospace, supply chain and logistics provide a fertile ground for cultivating new opportunities as part of this regional effort.

Getting started:

- ▶ Leverage the newly formed industry council to identify or validate opportunities and confirm interest.
- ▶ Evaluate alignment of industry, universities and venture development entities to determine how effectively the regional innovation ecosystem is operating.
- ▶ Identify resources or initiatives to advance these efforts (e.g., grant support, pitch competitions, first customer connection, testing facilities/infrastructure needs).

Example:



- ▶ [Tulsa Innovation Labs](#) builds ecosystems to support emerging industries such as advanced air mobility (AAM).
- ▶ They play an essential role in executing the Tulsa region's [Build Back Better Regional Challenge](#) and [Tech Hubs](#) initiatives related to AAM.
- ▶ Together, Tulsa and Northwest Arkansas have a long-standing bi-state commitment to elevating the 412 corridor as a global hub for AAM.

Potential innovation areas to expand and explore:

- ▶ *Sustainable Aviation Fuel (SAF)*
- ▶ *Advanced Air Mobility*
- ▶ *Cyber physical systems*
- ▶ *Airports as testing grounds*
- ▶ *Connectivity with adjacent industries (health, military)*

Growing infrastructure to support future growth

Site availability for economic development projects emerged as a consistent theme in discussing the potential of this new regional effort with stakeholders—i.e., how could the region work together across jurisdictional boundaries to grow and market the supply of certified, development-ready sites to compete for projects of all sizes in the target sector?

But site availability is far from the only infrastructure issue of interest to participating organizations in this new effort. The challenge is not so much in identifying common needs, as many areas of the Cincinnati/Northern Kentucky-Dayton-Louisville corridor share the same needs or goals related to infrastructure development. Rather, it is to determine how a regional effort like this one engages effectively on what can be viewed primarily as a local, or even site-specific, issue.

Getting started:

- ▶ Get an accurate view of the picture. Leverage the newly formed industry council to understand how employers in the target sector view infrastructure needs and what to prioritize to achieve maximum ROI.

Initiatives discussed:

- ▶ Advocate for site certification and funding to grow the supply of development-ready sites for projects of all sizes, prioritizing airport proximity.
- ▶ Ensure that priority sites and other infrastructure opportunities are emphasized in federal and state plans (e.g., comprehensive economic development strategies).
- ▶ Explore the feasibility of a centralized inventory of available sites as a component of the web presence for this regional effort and host familiarity tours to engage companies, brokers and developers.
- ▶ Encourage public-private partnerships to establish corridors of opportunities (e.g., aerotropolis, flight testing corridors, MRO centers, cargo facilities).
- ▶ Continue participating in the Kentucky Sustainable Aviation Fuel Coalition and look for opportunities to expand collaboration regionwide.

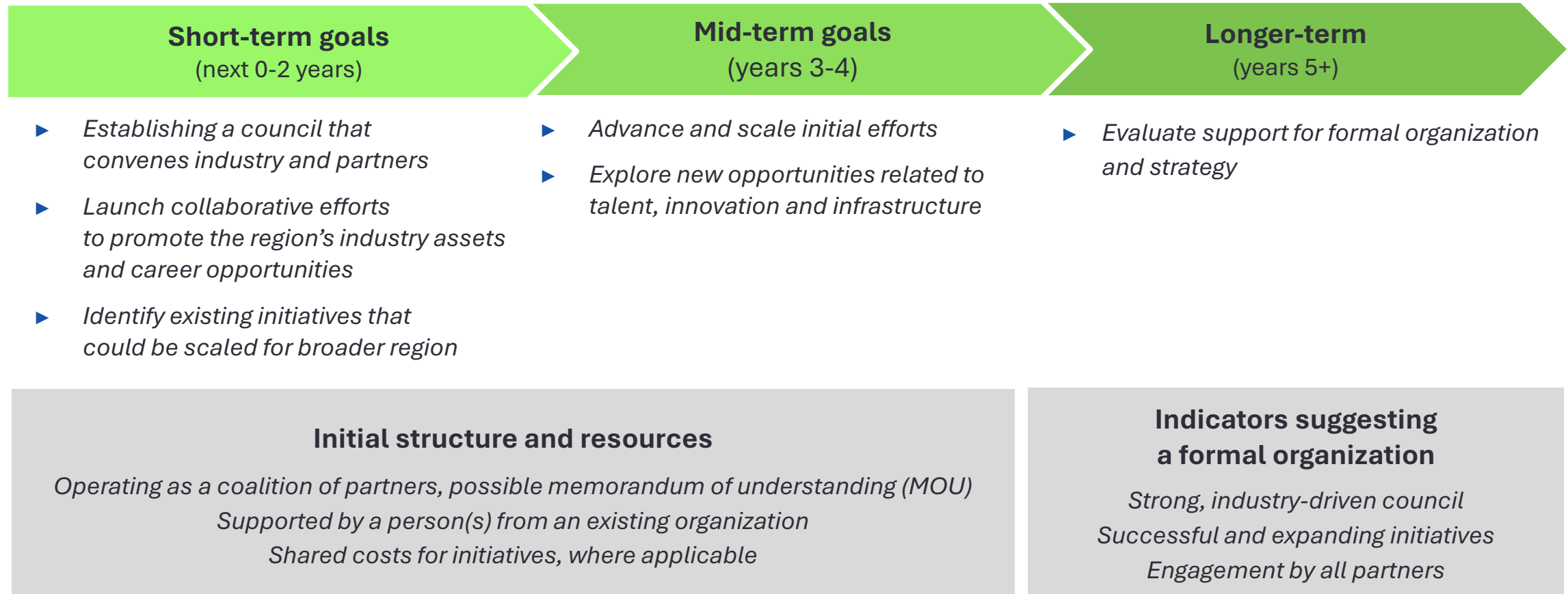


Moving forward



A plan for moving forward

The opportunities outlined in the previous section provide a vision for what is possible. Achieving this vision would likely require dedicated time and resources over the course of the next several years. But the foundation for success is built in the short-term with the establishment of an industry council and some quick, easier wins that demonstrate the possibilities when working together. As momentum grows, so can the depth and breadth of these initiatives. The illustration below shows how those initiatives could happen over the short, mid and longer term and the structure and resources that could be support their advancement.





Short-term goals (0-2 years)



During the first two years, the primary goals are setting the table for industry to convene and engage, as well as building internal awareness for the opportunities that exist when working together and external awareness for the many assets of the region.

Initial organizational steps

- ▶ **Identify an interim lead** for this initiative. Currently identified by the group as CVG airport.
- ▶ **Engage a marketing firm** to determine a formal name for the initiative and region that clearly communicates to industry what we are talking about and to the world where we are referencing.

Creating an industry-led council

- ▶ **Assemble a list of potential industry and groups of partners** to engage (e.g., talent, infrastructure, innovation, marketing), leveraging airport and economic development teams. Consider using the 2023 Tech Hubs consortium list and governance model as a starting point.
- ▶ **Develop and execute a coordinated outreach plan** for engaging these industry and partners. Consider a joint invitation to reinforce the collaborative approach. The executive summary and this report can be used to communicate intent and opportunities. Also leverage any existing support mechanism to advance these efforts such as a statewide manufacturing association.
- ▶ **Determine length and location for first meeting**, noting that an initial informational session could be virtual. The first meeting could be used to present the work to-date, gauge overall interest in moving forward and gather thoughts for keeping industry engaged (e.g., purpose, length, location, cadence of meetings).
- ▶ **Continue to convene industry** based on guidance from initial meeting. **Consider identifying two-to-three initiatives or priorities** to strive for in the first two years. Bring partners in to support these initiatives and provide regular progress updates.



Short-term goals (0-2 years)



Building internal and external awareness

- ▶ Convene economic development and other marketing partners to **identify potential shared opportunities for increasing global recognition**. These could include a joint lead generation contract, coordinated participation in an upcoming tradeshow, conference or business development mission, and joint marketing pieces.
- ▶ **Establish a shared way for how the partners talk about the opportunities** that exist leveraging the naming conventions created by the previously mentioned marketing firm. This could also include a set of shared talking point or marketing piece that highlights the shared assets and individual region's strengths.
- ▶ **Build out a web presence with a two-fold purpose** 1) promoting the industry council and opportunities identified and 2) promoting the industry assets and/or career opportunities. This could also feature a news feed that illustrates the volume of activity in the industry.
- ▶ **Evaluate the need for a formal memorandum of understanding (MOU)** between marketing and economic development partners as to how shared leads and intelligence throughout this partnership are handled.
- ▶ **Identify opportunities for a shared lead generation contract**. This lead generation contract could be focused on the industry overall, an upcoming event, or specific geographies for a shared business development mission.
- ▶ As industry support grows, **evaluate interest in industry providing lists of customers and suppliers** they would like to attract to the region. This list could also be part of a shared marketing or lead generation effort.
- ▶ **Evaluate interest in an advocacy-related event or initiative** that highlights the importance of the industry to state and/or federal partners. If ever relevant, mobilize partners to show support for specific issues or opportunities.



Short-term goals (0-2 years)



Identify other opportunities

Based on the interest or capacity of other partners, consider exploring other opportunities within the first two years. These could include the following:

- ▶ Identifying successful talent initiatives that could be scaled to support the broader region. This could also include information sharing between partners of lessons learned and leading practices.
- ▶ Scanning for funding opportunities that align with the goals of this initiative.

For the first two years, these initiatives as outlined could be supported by a staff person within an existing organization. If and when financial resources are needed to support a bigger initiative (e.g., marketing collateral development, lead generation contract, event participation), then partners could agree upon a way to share in those expenses. However, at the end of this stage, it could be time to evaluate whether a formal entity should be established to support these and other ongoing efforts.



Mid-term goals (3-4 years)



The goals of years three and four would be to continue scaling the efforts established in the first two years and adjusting, as necessary, based on lessons learned and industry feedback.

Continue to advance and scale initial efforts

- ▶ Continue meetings of industry and partners to advance any priorities established during the first two years.
- ▶ Consider updates or expansions to current marketing efforts based on success and feedback from the past two years. These could include global events, web presence, marketing collateral and lead generation efforts.
- ▶ Build upon any ongoing talent initiatives given the support of an established industry council.

Explore new or expanded opportunities

- ▶ **Revise the initial list of priorities for the mid-term** related to the council and its shared marketing efforts. Leverage these as a roadmap for the next two years and for guidance on what you report as progress to the industry council and any supporting partners.
- ▶ **Consider an industry needs assessment** to identify shared challenges related to infrastructure, workforce, supply chains, innovation, etc. that could be addressed over a longer period (or through the longer-term proposed strategy).
- ▶ **Position region to pursue future federal grant opportunities** or assess interest in bringing life back to the Cincinnati/Dayton tech hubs proposal by convening these partners and discussing new opportunities for funding or support. Perhaps include key components often seen in these type grants and how this initiative could be used to be more competitive. Those include cross-sector collaboration, industry engagement, workforce, support for disadvantaged populations, and innovation commercialization.

By this stage, it should be clear whether there is enough momentum to move forward with a full strategy and organization to support the aviation economy. Indications might include increasing participation and engagement in the industry council, growing support for the joint marketing efforts and new initiatives supporting the aviation economy.

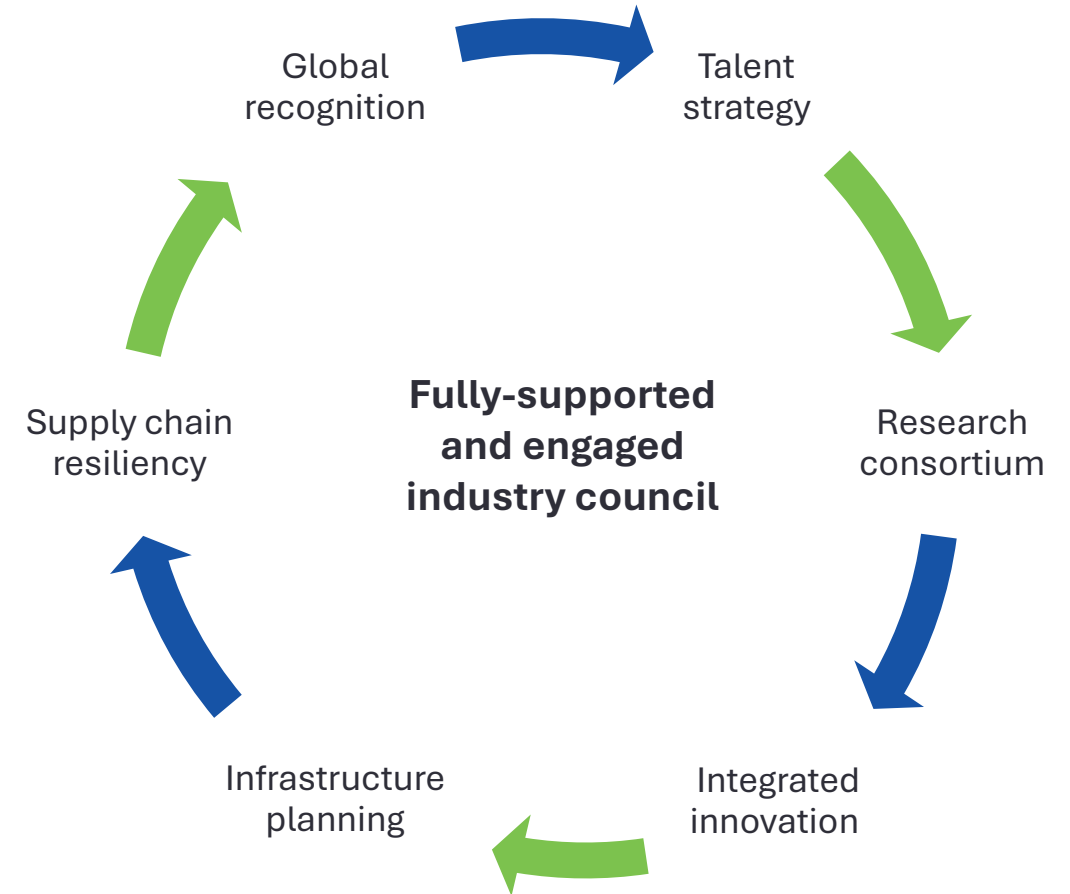
Long-term goals (5+ years)

By the five-year mark, the goal would be to develop a full strategy to support the aviation economy and an organization with dedicated resources and staff for activating it.

A full framework for accelerating the aviation economy could include:

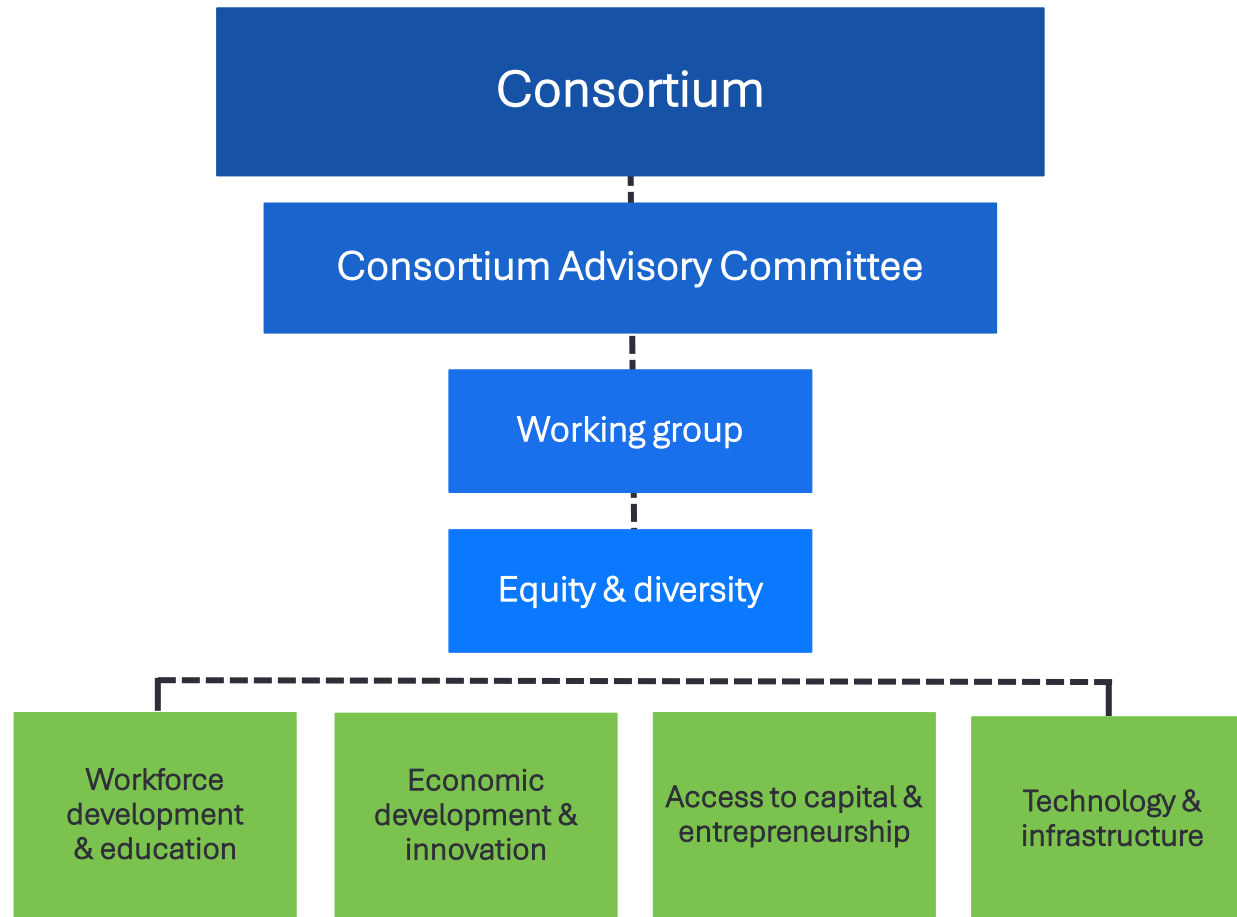
- ▶ An industry council
- ▶ Global marketing initiative
- ▶ Supply chain-focused attraction efforts
- ▶ Talent advisory team
- ▶ Research consortium
- ▶ Technology integration team/hub
- ▶ Infrastructure advisory effort
- ▶ Organizational support

The strategic planning process could include an industry competitiveness assessment and economic impact report, strategy sessions with the industry council to identify priorities and tactics, and an organizational plan for advancing the strategy and industry long-term.



Implementation guidance

The advisory committee suggested using the 2023 Tech Hubs consortium list and structure as a starting point for launching the industry council. That governance structure is illustrated below and could be adapted as needed.



Working groups

- ▶ **Workforce Development and Education** - Leading efforts around workforce development, education and training, including work-based learning opportunities (e.g., internships and apprenticeships)
- ▶ **Economic Development and Innovation** - Advancing programs and initiatives that contribute to job creation through business attraction, retention, and expansion, as well as research and development, tech transfer and other activities
- ▶ **Access to Capital and Entrepreneurship** - Organizing activities that lead to increased financial capital and other resources for entrepreneurial companies, and a more robust and aligned ecosystem
- ▶ **Technology and Infrastructure** - Identifying and developing critical assets such as software and hardware, data and digital infrastructure, and real estate needed to grow the core technologies.
- ▶ **Equity and Diversity** - Focused on leveraging existing equity, diversity and inclusion efforts and helping to integrate equity priorities across working group

Implementation guidance

The advisory committee suggested using the 2023 Tech Hubs consortium list and structure as a starting point for launching the industry council. That consortium list is provided below and would likely need to be expanded to include a broader industry definition, the associated industry down to the Louisville region and the specific priorities outlined by the future industry council.

Air Force Institute of Technology	City of Springfield	Greene County CTC	Port of Greater Cincinnati Development Authority
Air Force Research Lab	Clark State College	Hamilton County, OH	Procter & Gamble
Alloy Growth Lab	Dayton Foundation	JobsOhio	REDI Cincinnati
America Makes - Youngstown	Dayton Regional STEM School	Lightship Capital	Safran (NKY)
Arctos	DDC	Meyer Tool	Sinclair College
BE NKY	Dept of Air Force Digital Transformation Office	Miami University	SOCHE
Blue North	eGateway Capital	Miami Valley CTC	SORTA
Brown/Clermont Counties	Entrepreneurs Center	Miami Valley Urban League	Southwest Ohio Region Workforce Investment Board
Butler Tech	Fastlane MEP	Mile Two	TANK
Cedarville University	Fitz Center for Leadership in Community	Montgomery County	TechSolve (Mfg. Extension Centers)
Central State University	Fives (NKY)	Montgomery County ESC	Tenet 3
Cincinnati / Northern Kentucky International Airport	Fly Ohio-ODOT	MVRPC	United Way of Greater Cincinnati
Cincinnati ALF-CIO Labor Council	Galois	National Advanced Air Mobility Center of Excellence	University of Cincinnati (+Research Institute and 1819)
Cincinnati Business Committee	Gateway Community & Technical College	Northern Kentucky University (Innovation & Entrepreneurship)	University of Dayton
Cincinnati Development Fund	GE Aerospace	Northern KY Chamber	Urban League of Greater Southwestern Ohio
Cincinnati State Community & Technical College	General Tool	Ohio Cyber Range Institute	Velontra
Cincinnati USA Regional Chamber	Global STEM Academy	Ohio University	WIB Area 7 - Ohio Department of Jobs & Family Services
CincyTech	Great Oaks Career Campus	OKI Regional Council of Governments	Wilberforce University
Cintrifuse	Greater Cincinnati Foundation	OMEGA CDC - Promise Neighborhood	WPAFB Council of Governments
City of Cincinnati, OH	Greater Cincinnati STEM Collaborative	One Dearborn	Wright State University
City of Evendale	Greater Cincinnati/NKY African American Chamber of Commerce	OneNKY Alliance	Xavier University
	Greene County	Parallax Advanced Research	



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