

CROSSROADS CATALYST WEST CENTRAL INDIANA REGIONAL GROWTH PLAN

SK HYNIX SEMICONDUCTOR INDUSTRY
READINESS ASSESSMENT

2025

CARROLL COUNTY - PART I

Q1. WHAT CAN YOUR COUNTY DO FOR SK HYNIX?

Carroll County is strategically located within the region and is rich in historic attractions and quality of place resources. Most importantly, the partners of this County have already made substantial investments in training, infrastructure, housing sites, and new quality-of-life amenities. Leaders are ready to work with new businesses and developers. The following categories highlight these efforts:

TRANSPORTATION

Accessing sites for the workforce to come into the county or residents to commute to their jobs puts Carroll County in a favorable transportation position for business, tourism, and housing development purposes.

- ▶ Rail access is available via Norfolk Southern and Genesee and Wyoming railroads, and the County has two rail-served sites.
- ▶ Hoosier Heartland Highway connects Lafayette, Delphi, and Fort Wayne.
- ▶ The Delphi Municipal Airport has instrument landing capabilities and a longer runway for various aircraft. The runway is 4,000 feet long by 60 feet wide.
- ▶ The Flora Municipal Airport has a 2,143-foot turf runway and is 1/4 mile south of State Road 18 West.

It should be noted that public transportation options for residents are limited, and there is no CityBus service.

TRAINED LEADERS

Clear, forward-thinking, and trained leadership is necessary to drive change that works for existing and future residents and businesses.

- ▶ The recent relaunch of the Leadership Carroll County program is a step in the right direction and shows interested businesses and developers that this County is taking positive steps toward increasing its leadership capacity.
- ▶ A strategic plan for Flora includes methods for accessing grant funds to make infrastructure improvements to expand capacity for housing and industry. This shows that leadership is making decisions to provide for the future growth of the community.

TOURISM

Carroll County has a great foundation for tourism due to the:

- ▶ Wabash & Erie Canal.
- ▶ The Delphi Opera House.
- ▶ Indiana Bacon Festival.
- ▶ Historic downtowns and main streets.
- ▶ Approximately 10.5 miles of already constructed trails in and near Delphi, with the Pioneer Road Trail and Interurban extension yet to come.
- ▶ Lake Freeman.
- ▶ The Madam Carroll.
- ▶ Camp Tecumseh.
- ▶ Carroll County Fair Grounds -Flora.
- ▶ Historic Attractions: Adams Mill and Flora Depot. American House Stagecoach Museum, The Carroll County Courthouse.

To accommodate tourists without a hotel in the County, historic homes have been turned into Airbnbs. Hotels are an opportunity for out-of-town company executives on weekdays and tourists on weekends.

- ▶ Two hotel studies have been performed for the CCEDC with favorable results.

INFRASTRUCTURE

Carroll County partners have been working to add capacity to their infrastructure systems to be ready for new development, including:

- ▶ The City of Delphi has added 500,000 gallons of water capacity to accommodate industrial growth.
- ▶ Delphi is already constructing and has nearly completed a wastewater clarifier project, and new retention storage tanks are in the planning stages to add additional capacity.
- ▶ Carroll County improved its development water capacity to 650,000 gallons.
- ▶ Investments from the Town of Flora include capacity expansion at the wastewater treatment plant.
- ▶ The Town of Camden is in the process of upgrading its water treatment plant, including:
 - Replacement of the failing gravity filter.
 - Cleaning and rehabilitating the detention tank.
 - Addressing rust and manganese in the distribution system.
 - Reducing energy consumption by upgrading manual read meters with new digital read meters.



Photo: Joe Mayfield.

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We have laid the groundwork for continued success.

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Q2. WHAT ARE YOUR COUNTY'S BIGGEST CHALLENGES IN BENEFITING FROM THE SK HYNIX DEVELOPMENT?

While Carroll County has a great identity and has worked to create opportunities there are still headwinds that need to be addressed to see growth related to the semiconductor industry.

HOUSING

Carroll County's long-term goal is to retain workers in the community by considering initiatives that promote local industries. A key to this is ensuring sustainable housing for various income levels.

- ▶ Available and affordable housing is a leading aspiration of Carroll County residents.
- ▶ Five ongoing housing developments, with single- and multi-family homes and apartments, will increase Delphi's population by 10 percent.
- ▶ Phase I of the Burnbrae Farms Sub-Area Plan housing development broke ground in 2024 with 71 homes platted. Additional phases are planned to triple that growth.
- ▶ The new Delphi Interurban Apartments offers 68 meticulously designed units.
- ▶ The READI 2.0-funded infrastructure build-out will result in the construction of a 29-lot single-family subdivision in the town of Flora. The subdivision will be developed on public streets maintained by the town and serviced by water and sewer provided by the town.

While still a concern, the County has made significant strides on this topic and demonstrates a commitment to helping create new housing options.



HEALTHCARE

Healthcare access is a barrier for Carroll County residents and is a leading quality of life factor need. While there are great resources as shown below, more access is needed.

- ▶ The closest urgent care clinic is 30 miles away.
- ▶ With an older community population, access to care is closely tied to other factors, such as transportation and infrastructure that are not readily available.
- ▶ The Family Health Clinic has two Carroll County locations, located in Burlington and Delphi. These clinics offer full-service primary care for all age groups. The clinic accepts all insurance types and is open to those without private health insurance.
- ▶ Carroll County has two primary care physician locations that provide comprehensive care for patients of all ages in Flora and Camden.

AGING IN PLACE

Carroll County has dedicated elder care facilities, as outlined below, but aging in place was still noted as a challenge.

- ▶ St. Elizabeth Healthcare Campus is a privately owned nursing home facility that offers skilled services and assisted living options.
- ▶ Carroll Manor is a publicly owned assisted living facility.

CHILDCARE + SCHOOLS

Limited childcare resources are a barrier to Carroll County's attracting and retaining residents, and they will continue to be.

- ▶ The Children's Garden Childcare facility opened in 2025 in Flora. The new center offers 68 additional seats, providing much-needed relief to families seeking quality childcare options in Carroll County.
- ▶ Quality childcare before elementary school is crucial to the workforce of Carroll County, lowering unemployment and attracting and retaining talent while preparing children for success.
- ▶ The Early Learning Alliance of Carroll County should be leveraged during future phases of regional planning efforts.

Q3. WHAT DOES SUCCESS LOOK LIKE TO YOU?

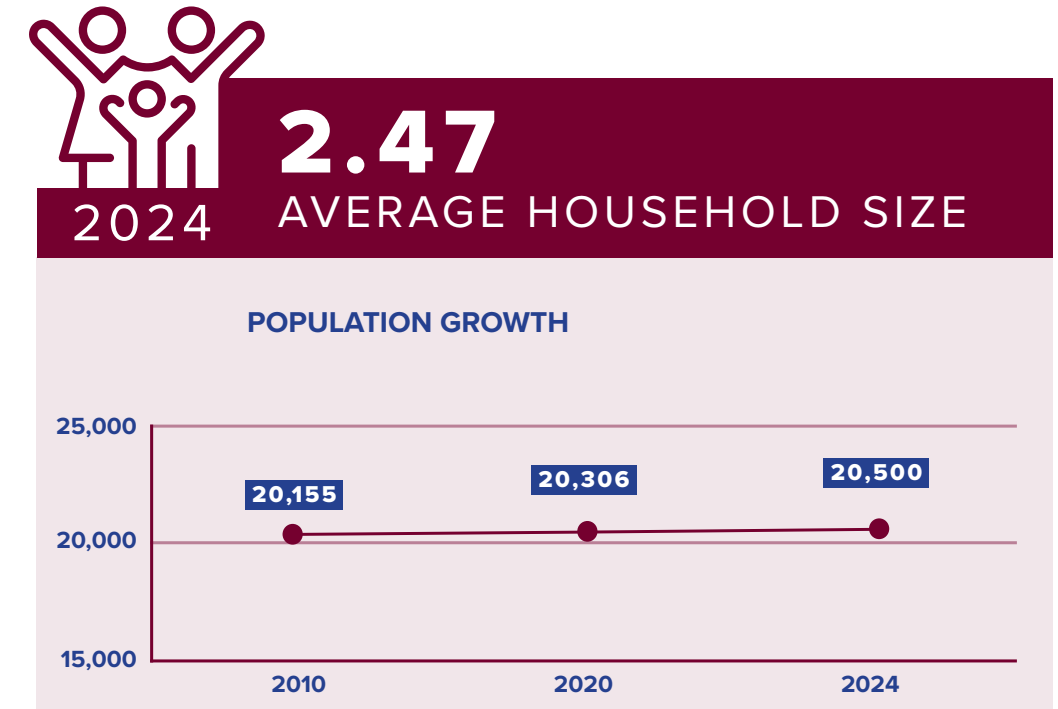
Carroll County is working hard to establish the foundation and infrastructure for economic development and growth.

"If you build it they will come" is wonderful in theory but difficult in reality. Building trust is paramount for Carroll County to ensure people feel successful. Key facets to this were:

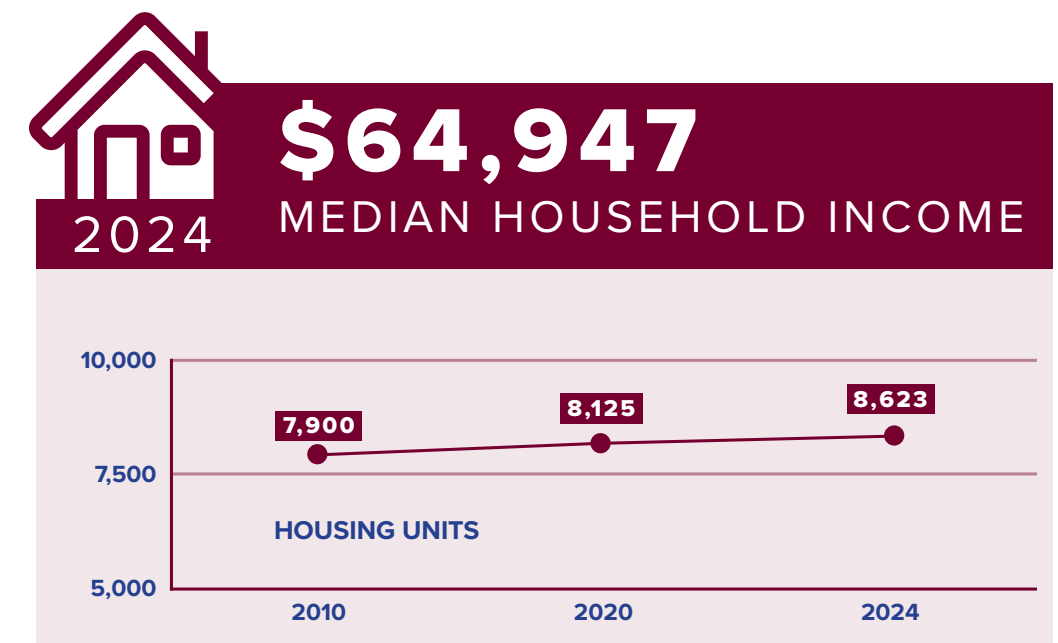
- ▶ Maintaining the small-town feel even as Carroll County's towns grow.
- ▶ Keep and support the agricultural industry as other industries move in.
- ▶ Support the older population even as Carroll County attracts younger populations. (There is a paradox that lives within this based on different appetites for change and what success looks like.)
- ▶ Elected leadership that continues to train.
- ▶ Continue to add new housing units and options.
- ▶ Attracting a hotel.
- ▶ Adding more development-ready supplier sites.

KEY DEMOGRAPHICS

Carroll County's population has remained stable and slightly increased since 2010. While not growing at a fast rate, the County has gained population, which is a credit to the proactive efforts discussed during the public engagement session.



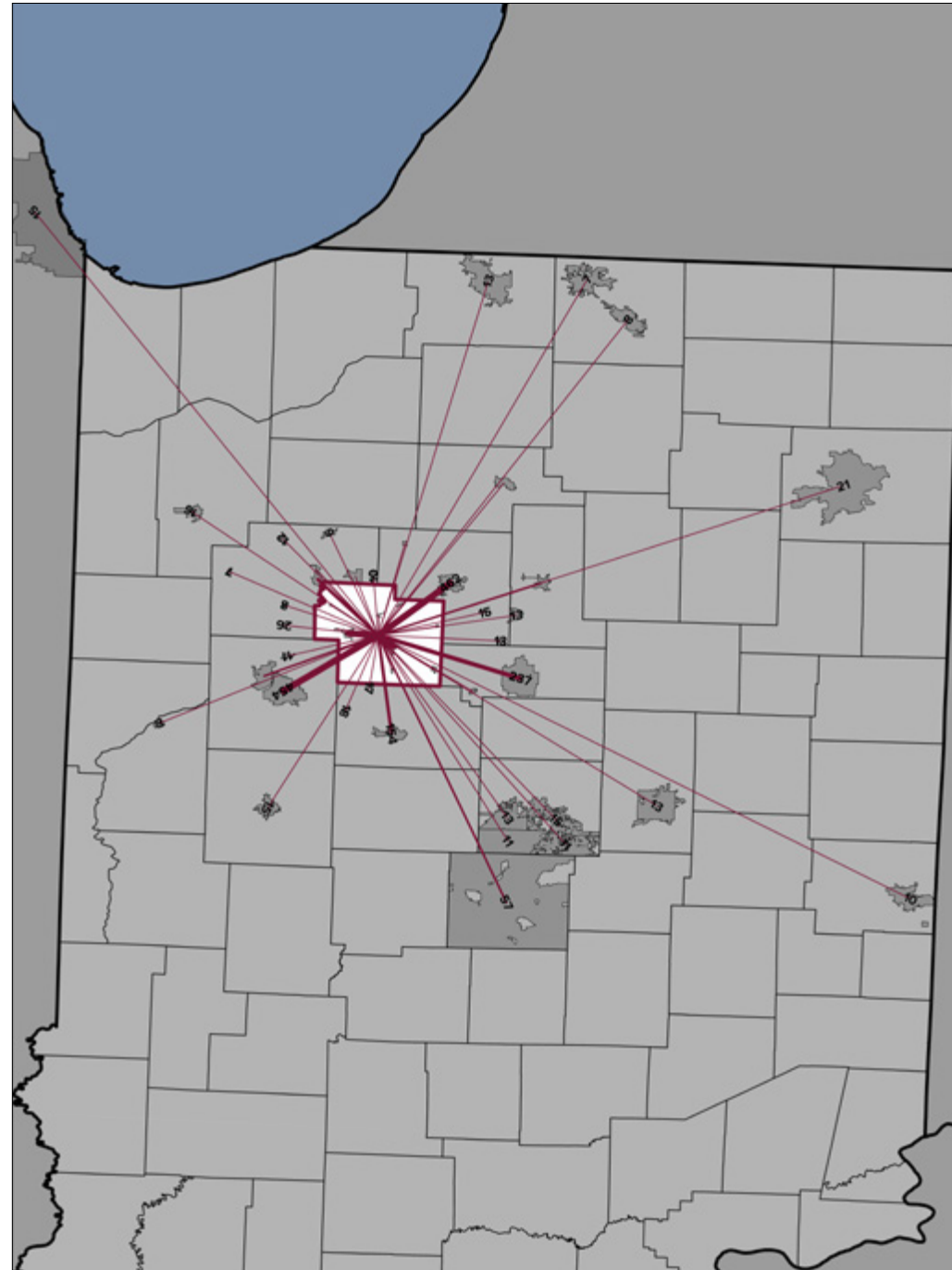
Housing units have increased since 2010 in Carroll County, with a noticeable shift in momentum starting in 2020. The County has seen approximately 500 units added since 2020, which demonstrates that there is a market for new construction and that efforts to encourage growth are working. This information should be leveraged to attract continued developer interest in the County. The County's median income was \$64,947 in 2024 and informs us that County residents are earning good incomes that support new housing demand.



WHERE RESIDENTS WORK

Given the large focus on workforce housing and attracting a local workforce, commute patterns for Carroll County were examined. Employees commute to work at local businesses from various geographic regions all over Indiana. The commute pattern illustration shows the range of where workers travel from. This map also shows the number of commuters from their home residents with a red number over their home destination. Thicker red lines also indicate that a larger number of people are commuting from those starting points.

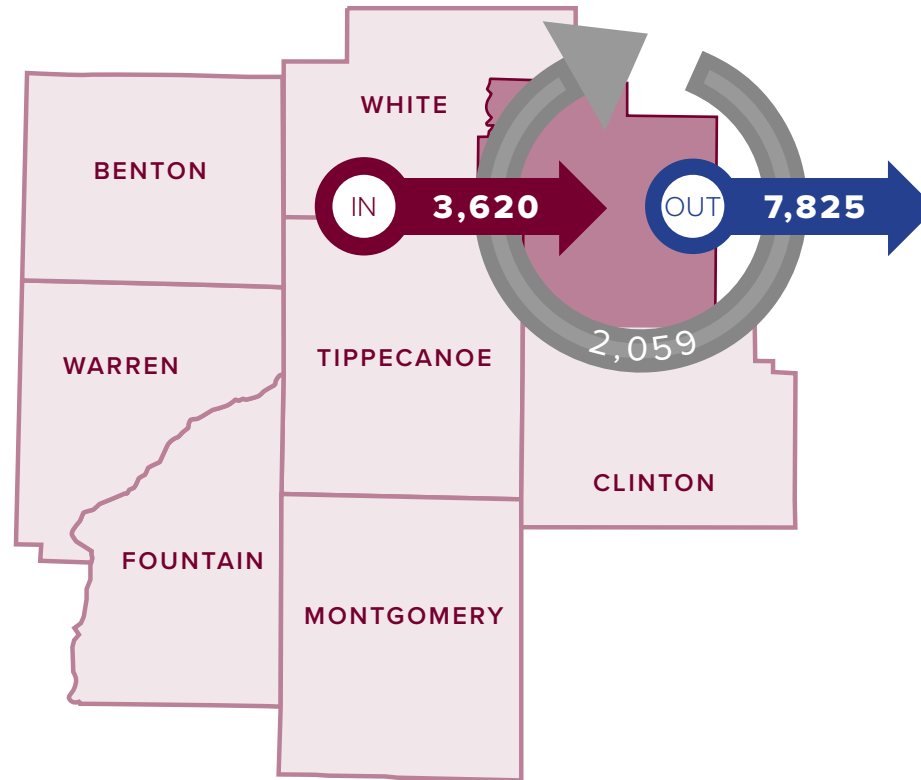
Carroll County attracts workers who are both residents and commute from all over the northern half of Indiana to work in local businesses. Carroll County workers' top four home destinations were Logansport, Lafayette, Delphi, and Flora, comprising 27.6 percent of the county's workforce.



LABOR COMMUTE PATTERNS

In 2022, 5,679 individuals were employed in Carroll County. Local commute patterns illustrate that 50.3 percent of those employees both live and work in Carroll County. During this same year, 7,825 Carroll County residents worked in a business outside of the County, while 3,620 workers employed at Carroll County businesses lived somewhere outside of Carroll County's boundaries. These workforce trends tell us that commuting from the County is frequent and that commute times for SK hynix employees should not hinder housing growth marketed towards these employees.

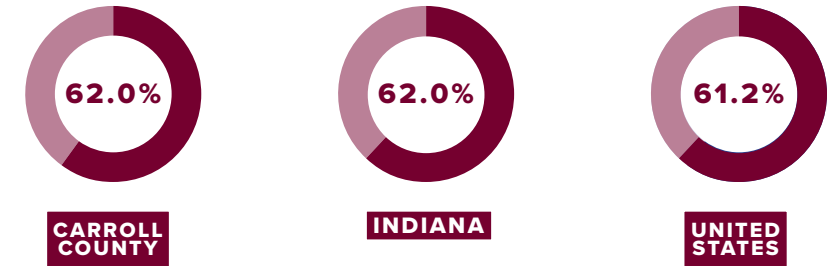
WHERE ARE PEOPLE WORKING?



WORKFORCE

In 2022, Carroll County's labor force participation rate was higher than the US average and on par with the State of Indiana. It is a great indicator that the residents of Carroll County are actively engaged in the workforce, but also implies a shortage of new workers to fill positions created by SK hynix and its suppliers.

LABOR FORCE PARTICIPATION RATE COMPARISON



The Wabash & Erie Canal serves the Carroll County community as one of its biggest tourist draws, as well as a recreation area via Canal Park that offers a wide variety of trails and historic sites for residents and tourists to enjoy.



POLICY CONSIDERATIONS

- ▶ 2024 Conversation with Our Community, main policy highlights:
 - Compassionate and growing community.
 - Connected community for transportation and access to health
 - Care/jobs.
 - A safe and healthy community, increased healthcare.
 - A thriving community with childcare.
 - Trained leaders.
- ▶ 2024 the Town of Flora adopted a new Comprehensive Plan update.
- ▶ 2024 City of Delphi's most recent Zoning Ordinance update.
- ▶ Carroll County and the City of Delphi each operate a Redevelopment District that includes multiple allocation areas. Both entities also participate in three Residential TIFs (RTIFs), bringing the total number of active allocation areas to 10 across the county — though these do not represent 10 separate Redevelopment Districts.
- ▶ 2022 City of Delphi Comprehensive Plan Update.
- ▶ 2021 Burnbrae Farms Sub-Area Development Plan.
- ▶ Illustrated location, physical analysis, and potential of multiple types of residential development south of Delphi.
- ▶ In 2012, Delphi was selected as a Stellar Community by the State of Indiana, resulting in grants of nearly \$1.6 million for projects to revitalize the downtown commercial district, and provided a launch point for continued downtown development.
- ▶ 2008 Carroll County Comprehensive Plan update.
- ▶ 1971 most recent complete Carroll County Zoning Ordinance update.

REAL ESTATE MARKET

The following table illustrates the current state of available improved properties and land for sale in the categories most relevant to potential SK hynix/suppliers, land for housing, and quality of life support areas. This study focused on properties that can be activated in a relatively short time frame and do not reflect properties that may be available but are not currently listed on the market.

The categories listed below represent sites that have already been developed with buildings and support facilities. The exception is the land category, which strictly represents greenfield development sites actively listed for sale.

Property Type	Total Inventory	Percent Vacant	Available	Under Construction
Industrial	916,000ft ²	12.0	110,000 ft ²	0 ft ²
Retail	586,000 ft ²	0.5	7,700 ft ²	0 ft ²
Office	76,400 ft ²	0.0	0 ft ²	0 ft ²
Hotel	0 rooms	0.0	0 ft ²	0 ft ²
Land for Sale (more detail below)	225 acres	N/A	225 acres	N/A

MARKET INSIGHTS

- ▶ Zero square feet of retail, office, or industrial space was under construction in 2025.
- ▶ Very low or no vacancy in the retail and office markets was observed.
- ▶ Vacancies do existing with downtown Flora having over 10 percent and Delphi still looking to fill in some vacant storefronts.
- ▶ Vacant distribution space (50,000 SQ FT approximate) for lease in Delphi at 1101 West North Washington Street.
- ▶ There are no national chains or branded hotels currently built in the County.
- ▶ 2015, the CCEDC developed the 60-acre shovel-ready I-2 Hoosier Heartland Industrial Park in Delphi, Indiana.
- ▶ 2025 New 50,000-square-foot expandable up to 100,000-square-foot speculative building for sale on 10 acres with 20 contiguous acres available for additional expansion opportunities.
- ▶ A 12,123 SQ FT space for leased was listing existed in the Sycamore Industrial Park in Flora, which also has greenfield property for a 7-acre expansion.



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We have been proactive and created a new 50,000 SQ FT (expandable to 100,000 SQ FT) speculative flexible industrial building for sale and ready for a new tenant or supplier of SK hynix.

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CARROLL COUNTY - PART II

Carroll County has worked in recent years to create new opportunities for economic development by investing in public utilities and creating opportunities, including developing a new industrial park with a 50,000-square foot building available for lease. These stakeholders defined success in Part I as continuing to establish itself as a great place to do business with trained leaders, updated infrastructure, and providing places for new housing development. Stakeholders also stated that supporting existing agricultural industries and maintaining their small-town feel is integral to the county's future success. Given its ample historic and open space assets, county and local officials also saw the need to create new tourism opportunities through increased hotel development as a vital part of their economic development initiatives.

CARROLL COUNTY GROWTH AREAS

Three development areas were identified with Carroll County's representatives for residential and employment growth. True to the desires of this community, they are in and adjacent to the corporate limits of existing towns and take advantage of the area's current road, rail, and utility assets. The following areas were examined in more detail and highlighted on the County Growth Areas map:

Each area is located near existing communities with potential ties to infrastructure and quality-of-place assets. 2,500 acres of land were identified, and the highlights of each area are described below.

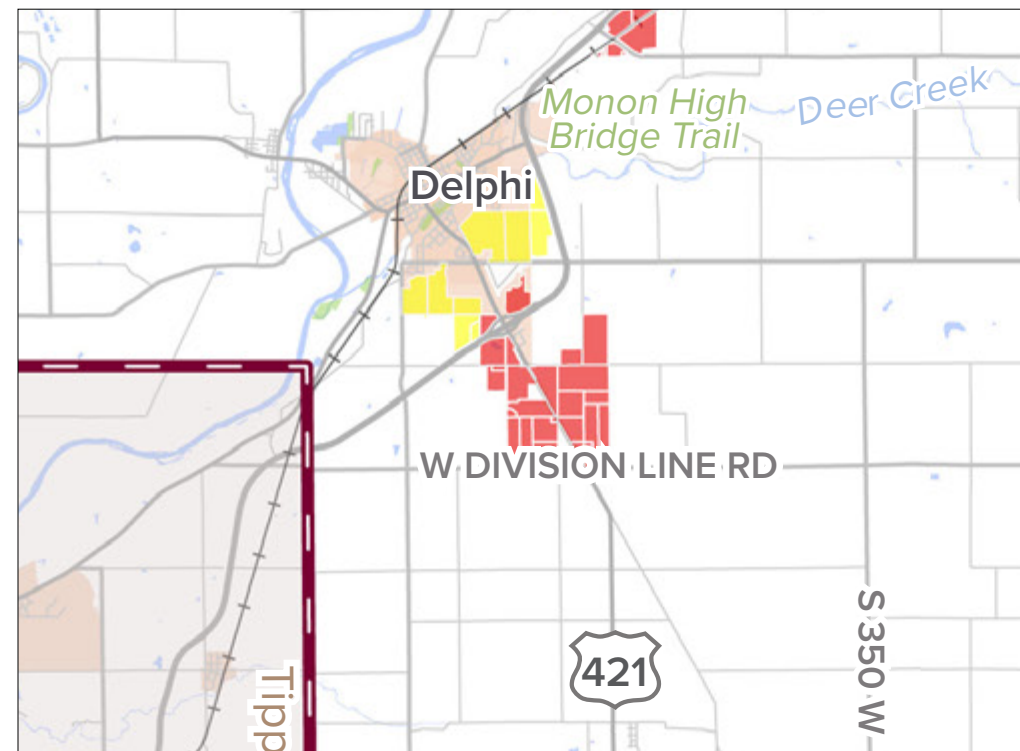
- ▶ County-Wide Employer/Supplier - 1,569 Acres
- ▶ County-Wide Residential Area - 931 Acres

DELPHI AREA

Delphi is the county seat of Carroll County and is located just east of Tippecanoe County along the Hoosier Heartland Highway (SR 25), which provides access to the SK hynix site. This town is a close 26-minute drive to the planned SK hynix construction area. Many local amenities are in or near Delphi, such as the Wabash and Erie Canal, the Delphi Opera House, Riley Park, new multi-use trails, and multiple historic attractions. Delphi is near multiple educational assets, including the Delphi Community Middle and High Schools, adult education facilities, and a public library.

This community has already been working on spurring residential growth south of Delphi with the Burnbrae Farms Sub-Area Plan. These approvals were incorporated into the 463-acre growth area shown south of the Town's corporate limits. These properties were zoned U-1 (Urban) and ready for continued development. Residential development in these areas is consistent with the Town's and County's most recent comprehensive plans. This location can take advantage of the easy commute and proximity to Delphi's resources to provide an ideal situation for employees. Continuing south from Delphi along US 421, another 1,003 acres were identified as a potential employer/supplier business expansion location. This type of development is also consistent with the County's comprehensive plan. However, most properties were zoned (A) Agricultural, except those in the Hoosier Heartland Industrial Park. These properties are partially located in existing TIF districts to help expedite funding of future development projects.

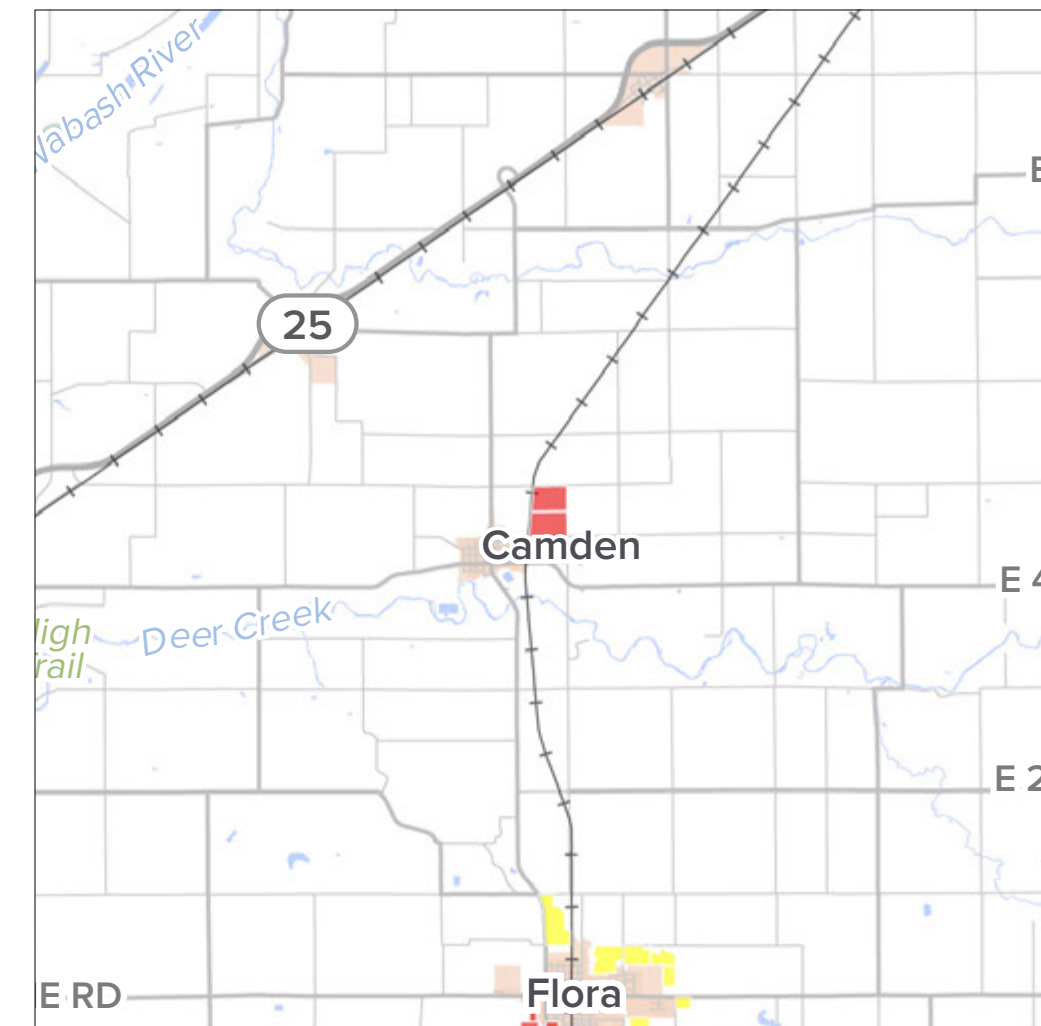
DELPHI AREA	1,466 AC
Acres of Employer / Supplier	1,003 AC
Largest Contiguous Site	337 AC
Acres of Residential	463 AC
Potential Units (Development Capacity)	1129-1333 Units



CAMDEN AREA

The Camden Area is a 43-minute drive for commuters to the SK hynix site. Area commuters and supply chain businesses access this portion of the County via SR 218 and the Hoosier Heartland Highway. One 142-acre employer/supplier growth area was identified on the northeast portion of the Camden corporate limits. This growth area, also known as the JNT Farms site, is adjacent to the Genesee-Wyoming Railroad, is rail-served, and zoned I-2. The properties were designated General Agricultural in the most recent version of the comprehensive plan's future land use map and are zoned (A) Agricultural. The county's ordinance includes some manufacturing-type uses in this zoning district as special exceptions, but it may not permit the supply chain businesses identified in Appendix A.

CAMDEN AREA	142 AC
Acres of Employer / Supplier	142 AC
Largest Contiguous Site	142 AC



- ▶ County Growth Areas: Employer/Supplier
- ▶ County Growth Areas: Residential

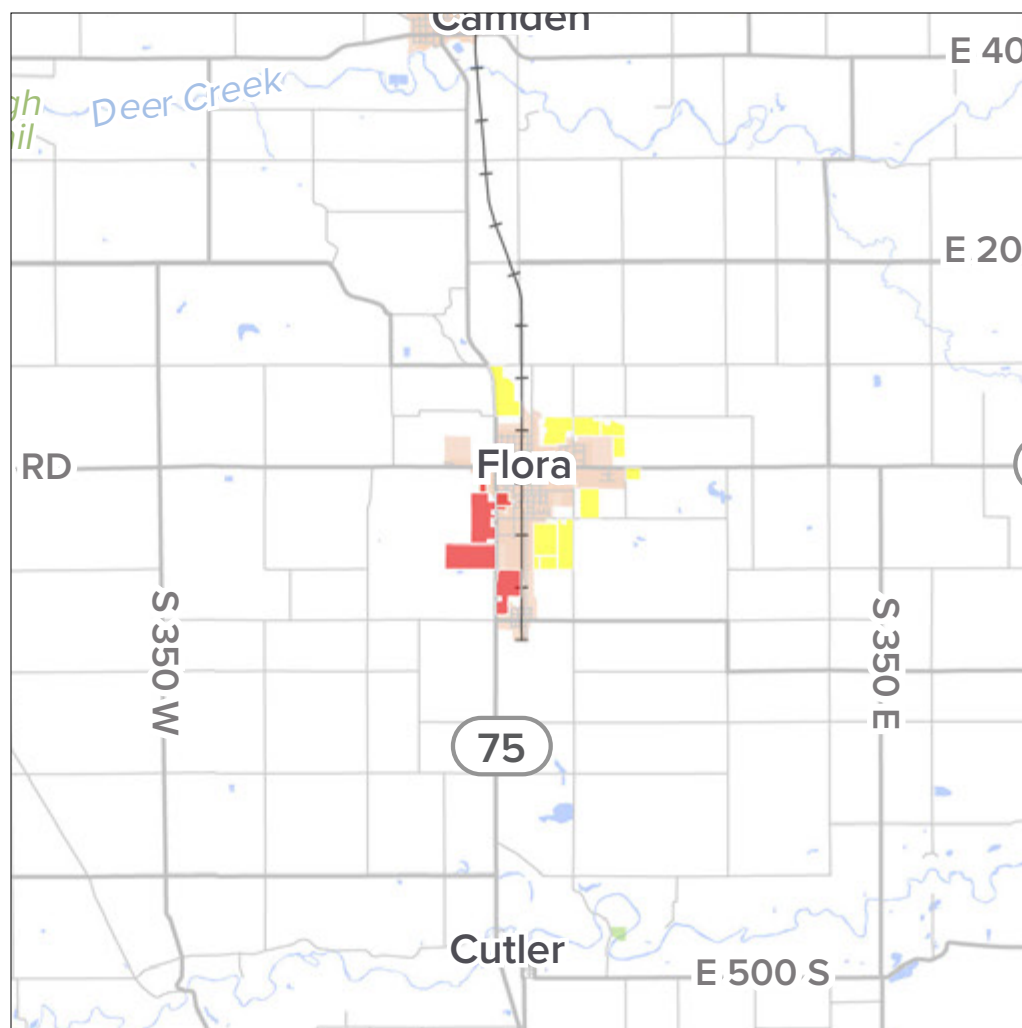


FLORA AREA

Flora is located at the intersection of Division Line Road and SR 18 and SR 75. This community is an approximate 53-minute drive to the SK hynix site and the West Lafayette area. This community includes the Carroll Consolidated School Corporation, which includes an elementary, junior high, and senior high schools, Flora Public Library, Carroll Community Center, County 4H Fairgrounds, Flora Depot and Children’s Garden Early Childhood Care and Education Center. Residential growth areas were identified east and north of the town’s existing corporate limits for a total of 344 acres of potential development. Most of the identified sites are zoned U-1 Urban Residential District in the county, which lists a variety of residential land uses and densities as permitted or special exceptions. The County’s comprehensive plan showed these locations as medium-density residential development, consistent with the desired land use. A TIF district has been created east and north of Flora, with a portion of the identified residential growth area.

Locations for 232 acres of employer/supplier sites were also identified to the west and south of Flora’s town limits. This growth area was shown as industrial in the 2008 comprehensive plan. A portion of these parcels are already zoned (I-1) Industrial. This district permits a variety of light manufacturing and warehousing businesses. Other parcels were zoned (A) Agricultural and would need to be modified to be developed as a site for the semiconductor supply chain.

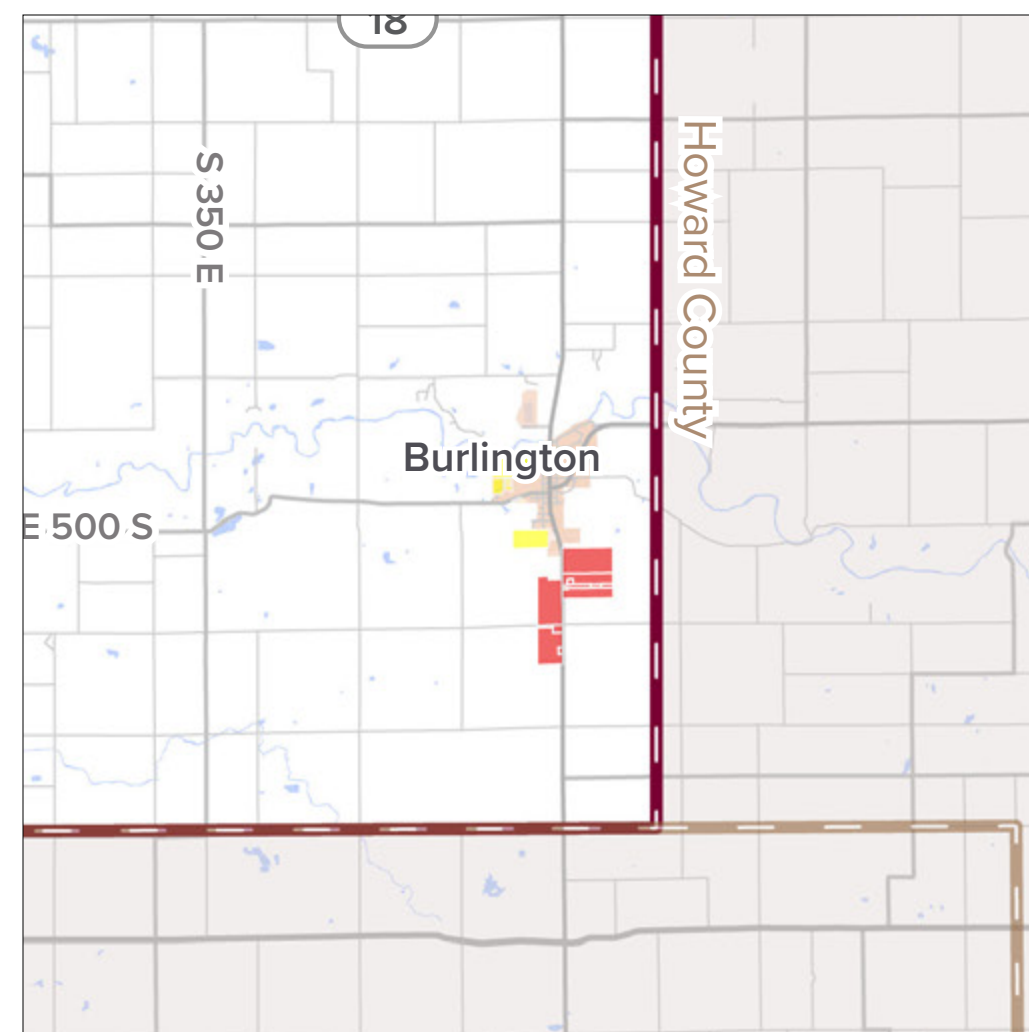
FLORA AREA	
Acres of Employer / Supplier	232 AC
Largest Contiguous Site	165 AC
Acres of Residential	344 AC
Potential Units (Development Capacity)	839-930 Units



BURLINGTON AREA

Burlington, located near the county’s southeast corner, has an approximate 50-minute commute time to the SK hynix site. The town has a public library and park facilities for new potential residents. Residential development sites were identified west of Burlington’s corporate limits. The 124-acre parcel in the growth area was zoned U-1, Urban Residential. 159 acres of employer/Supplier growth areas were also identified south of Burlington along SR 29. These sites were zoned (A) Agricultural and shown as remaining agricultural in the County’s comprehensive plan. A TIF district on the southwest side of Burlington exists for a portion of the properties identified in the residential growth area.

BURLINGTON AREA	
Acres of Employer / Supplier	192 AC
Largest Contiguous Site	158 AC
Acres of Residential	124 AC
Potential Units (Development Capacity)	302-357 Units



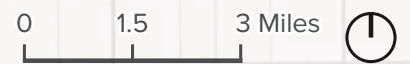
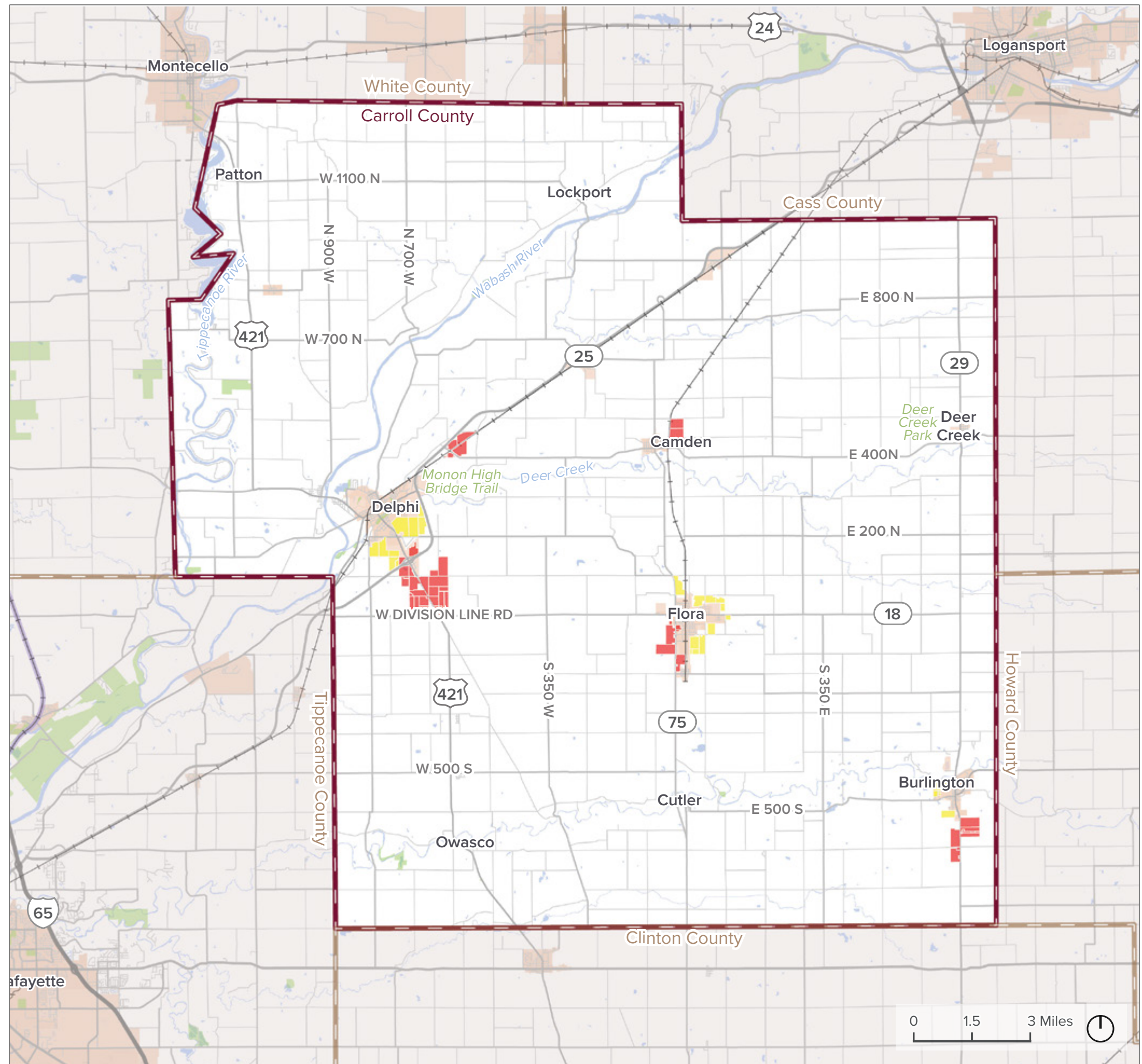
- County Growth Areas: Employer/Supplier
- County Growth Areas: Residential

COUNTY GROWTH AREAS

This page highlights the identified growth areas within the greater context of Carroll County. Red parcels indicate Employer/Supplier land use sites, and yellow indicates Residential land use sites. Each sub-area's total acreage and proximity to Purdue's campus in Lafayette, Indiana is noted below.

COUNTY-WIDE AREA	2,500 ACRES
DELPHI AREA	1,466 ACRES
	25 Miles from Purdue Campus 37-Minute Drive
CAMDEN AREA	142 ACRES
	38 Miles from Purdue Campus 43-Minute Drive
FLORA AREA	576 ACRES
	28 Miles from Purdue Campus 40-Minute Drive
BURLINGTON AREA	316 ACRES
	32 Miles from Purdue Campus 49-Minute Drive

- County Growth Areas: Employer/Supplier
- County Growth Areas: Residential
- Carroll County Boundary
- Adjacent County Boundaries
- Railroad
- Roadway
- Incorporated Areas
- Protected Natural Areas
- Waterbody



DEVELOPMENT CAPACITIES

Each identified growth area in Carroll County’s “shovel-ready” status was reviewed to determine its size and development capacity. Carrying capacity is defined as the number of residential units that may be built on these sites or the potential square footage of new supply chain buildings.

This study’s methodology identified 931 acres of land where exploring residential growth options was desirable. If these acres were developed, enough space for 2,270 to 2,602 units could be accommodated in these residential growth areas. Earlier in this study, it was noted that Carroll County should try to create between 681 and 745 new residential units by 2030 to keep up with current demands and the addition of the potential SK hynix workforce. In comparison, enough potential residential growth area was identified that could create 1,875 new units. Given the amount of land identified, if county officials can activate a substantial portion of these parcels, Carroll County could become a much larger contributor to providing workforce housing in the region beyond keeping up with its current demand.

Similarly, 1,569 acres of land (30,755,538 square feet of new building area) were shown as potential supply chain businesses. When considering the size of most semiconductor businesses identified earlier in the process, many of these properties can accommodate the multiple supplier business models in terms of acres needed. The type of supply chain businesses that may come to these sites will be heavily influenced by the availability of utilities at those sites. Water and sanitary sewer demand projections were not included for employer/supplier sites due to the high variance in utility demand between upstream and downstream employers. More detailed projections should be developed based on the specific types of suppliers the county chooses to pursue.

WATER AND SANITARY UTILITIES

One factor in being shovel-ready is having utilities adjacent to the property or within proximity. Having this information readily available is also a key component. The Future Growth Area’s conceptual plans illustrate Employer/Supplier and Residential developments primarily around the Towns of Delphi, Camden, Flora, and Burlington.

The estimated sanitary and water demands for the Carroll County residential growth areas are listed below. At this time, no residential growth areas have been identified in Camden, so they are not included in the demand estimations below; only projections for the residential growth areas have been considered.

CARROLL COUNTY RESIDENTIAL SANITARY DEMAND ESTIMATION

City or Town	Residential Area (acres)	Avg. Sanitary Flow (gpd)	Peak Sanitary Flow (gpd)
City Of Delphi	464	71,800	287,400
Town Of Flora	344	53,300	213,000
Town Of Burlington	129	20,000	80,200
Future Residential Totals		145,100	580,600

CARROLL COUNTY RESIDENTIAL WATER DEMAND ESTIMATION

City or Town	Residential Area (acres)	Avg. Water Flow (gpd)	Peak Water Flow (gpd)
City Of Delphi	464	71,800	179,600
Town Of Flora	344	53,300	133,100
Town Of Burlington	129	20,000	50,100
Future Residential Totals		145,100	362,800

The status of sanitary and water utilities was reviewed for each growth area, and the following existing infrastructure systems were revealed:

DELPHI AREA

Sanitary Infrastructure

The City of Delphi Wastewater Department is the sanitary service provider for the proposed development area. Utility mapping was not readily available when this study was prepared to link directly to the growth areas. Via the listings on ZoomProspector, we know that 12-inch and 8-inch sewer lines serve the Hoosier Heartland Industrial Park and could help serve adjacent growth areas.

The projected peak residential wastewater demand of 287,400 GPD for the planned future growth area will require a minimum of an 8-inch gravity trunk line. This is independent of any existing flow seen by the surrounding areas. Additional 8-inch gravity sewer may be required to collect flow from the growth sites.

Water Infrastructure

The City of Delphi Water Works Department is the water service provider for the proposed development area. Existing water infrastructure facilities are located throughout the entire city limits. Water facilities in this area primarily include 4-inch water mains with trunk lines ranging from 8-inch to 16-inch in some areas. Currently, no existing water facilities serve the Employer/Supplier growth areas identified southeast of Heartland Drive. Still, extending the existing 12-inch main may be possible to serve these areas. It was also documented that 500,000 gallons of new water capacity per day were recently added to Delphi’s system to help encourage industrial growth.

Assuming a peak residential potable water demand of 179,600 GPD, it is anticipated that the 8-inch to 16-inch water main trunk lines will be sufficient. Additional water main with a minimum diameter of 6-inch will be required to be extending into the growth areas.

CAMDEN AREA

Sanitary Infrastructure

The Town of Camden Utilities Department is the sanitary service provider for the proposed development area. The Town’s sanitary utilities range in size from 8-inch to 12-inch lines. They are restricted to the Town’s corporate boundaries, and do not currently serve the Employer/Supplier growth areas identified east of the Town. However, a pump station and force main could send the flow from the proposed growth areas southwest, crossing the railroad, to an existing 10-inch sanitary trunkline, which has a manhole located at the northeast corner of James Street and Illinois Street.

Water Infrastructure

The Town of Camden Utilities Department is the water service provider for the proposed development area. The existing Town of Camden water utilities are restricted to the Town’s corporate boundaries and do not currently serve the Employer/Supplier growth areas identified east of the Town. The water mains in the Town of Camden range in size from 4-inch to 8-inch. It may be possible to increase the existing 4-inch water main located near the intersection of James Street and Illinois Street to a minimum of a 6-inch water main to allow for an extension northeast to serve the proposed growth areas. This extended water main would require crossing an existing railroad.

FLORA AREA

Sanitary Infrastructure

The Town of Flora Utilities Department is the sanitary service provider for the proposed development area. The existing Town of Flora sanitary utilities are located near each proposed growth area except for the Residential growth area at the Bachelor Run Golf Club north of West 50 North. According to the Town of Flora’s Wastewater Treatment Plant Superintendent, sanitary trunklines are at least 8 inches at the outskirts of the Town boundary.

The projected peak residential wastewater demand of 213,000 GPD for the planned future growth area will require a minimum of an 8-inch gravity trunk line. This is independent of any existing flow seen by the surrounding areas. In some areas, the existing 8-inch sewer trunk line may need to be increased to accommodate the additional sanitary flow from the growth areas. An additional 8-inch gravity sewer may be required to collect flow from the growth sites.

Water Infrastructure

The Town of Flora Utilities Department is the water service provider for the proposed development area. No utility information was publicly available or received from the utility provider.

The projected peak residential water demand of 133,100 GPD for the planned future growth area will require a minimum of a 6-inch water main. This is independent of any existing water demands seen by the surrounding areas. Additional 6-inch mains may be required to distribute water to the growth sites.

BURLINGTON AREA

Sanitary Infrastructure

The Town of Burlington Wastewater Utility is the sanitary service provider for the proposed development area. According to a phone conversation with the Town, Burlington has existing sanitary utilities that follow the main roadways throughout the Town. These sanitary utilities extend as far south as the Burlington Faith Church of Christ on State Road 29, so additional infrastructure must be constructed to serve the southern Employer/Supplier growth areas. GIS mapping is currently unavailable.

The projected peak residential wastewater demand of 80,200 GPD for the planned future growth area will require a minimum of an 8-inch gravity trunk line. This is independent of any existing flow seen by the surrounding areas. Additional 8-inch gravity sewer may be required to collect flow from the growth sites.

Water Infrastructure

According to a phone conversation with the Town Hall on March 5th, 2025, the Town of Burlington has no existing water utility infrastructure. To allow for future development, water main extensions from neighboring towns with available capacity will need to be considered. Groundwater wells for residential use will need to be evaluated on a case-by-case basis.

The projected peak residential water demand of 50,100 GPD for the planned future growth area will require a minimum of 6-inch water main. This is independent of any existing water demands seen by the surrounding areas. Additional 6-inch mains may be required to distribute water to the growth sites.

ROAD IMPROVEMENTS

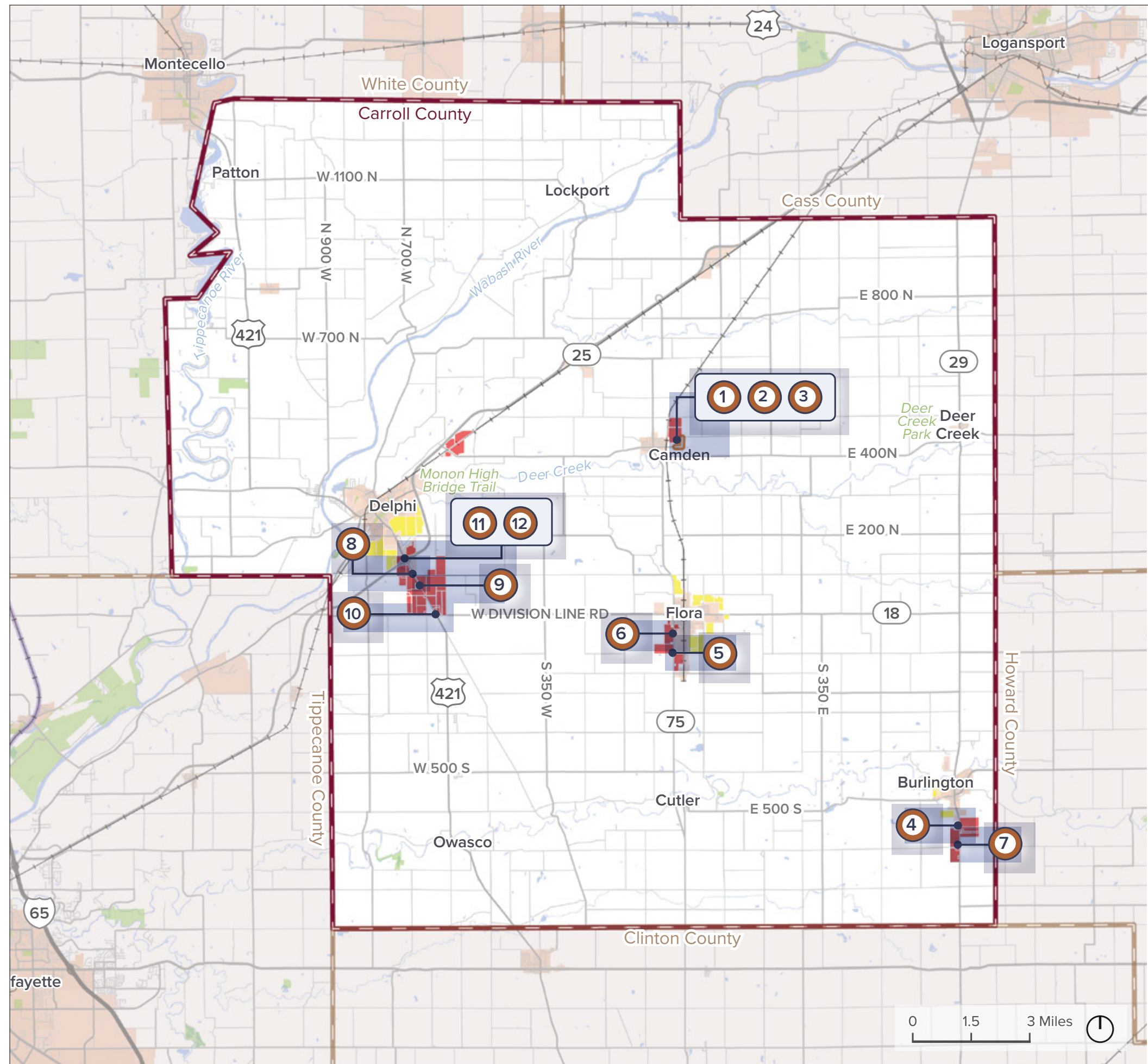
Adding new residential units or businesses will require extending or upgrading infrastructure. This study has identified a likely project that should be implemented to move these growth areas closer to shovel-ready status.

ROAD/STREET IMPROVEMENTS

To accommodate the development identified in the Carroll County Growth Areas, the following road/street improvements were identified. The potential cost of these road modifications was also included to help guide funding priorities.

1. East 400 North: 2-Lane Asphalt INTERSECTION IMPROVEMENTS - Cost: \$1,575,000
2. SR 218/West 425 North: Rural Intersection Signal with Turn Lanes - Cost: \$750,000
3. West 425 North/East 400 North: Rural Intersection Turn Lanes - Cost: \$500,000
4. East 600 South/CR 29: Rural Intersection Turn Lanes - Cost: \$500,000
5. CR 75/Unnamed Approach: Rural Intersection Turn Lanes - Cost: \$500,000
6. CR 75/West Clark Street: Rural Intersection Turn Lanes - Cost: \$500,000
7. CR 29/Unnamed Approach: Rural Intersection Turn Lanes - Cost: \$500,000
8. U.S. 421/West 100 North: Rural Intersection Signal with Turn Lanes - Cost: \$750,000
9. U.S. 421/Heartland Drive: Rural Intersection Signal with Turn Lanes - Cost: \$750,000
10. SR 28/West Division Line Road: Rural Intersection Signal with Turn Lanes - Cost: \$750,000
11. U.S. 421/SR 25: Interchange Modification Signal - Cost: \$250,000
12. U.S. 421/SR 25 (Part II): Interchange Modification Signal - Cost: \$250,000

- County Growth Areas: Employer/Supplier
- County Growth Areas: Residential
- Carroll County Boundary
- Adjacent County Boundaries
- Railroad
- Roadway
- Incorporated Areas
- Protected Natural Areas
- Waterbody



COUNTY ATTRACTIONS

In 2025, attracting companies that are part of the semiconductor supply chain or new residents will require more than having land available. The County's and nearby attractions, places of interest, and other quality-of-life features are displayed on the County Attraction Map. These amenities will serve as part of the larger foundation toward attracting new businesses and residents.

ENTERTAINMENT

- 1 The Madam Carroll
- 2 Wabash & Erie Canal Park & Conference Center
- 3 Delphi Opera House
- 4 Carroll County Museum
- 5 S Center Street (Downtown Flora)
- 6 Carroll County Fairgrounds
- 7 Adams Mill
- 8 American House Stagecoach Hotel

TRANSPORTATION CENTERS

- 9 Delphi Municipal Airport
- 10 Flora Municipal Airport

GROCERY & GENERAL STORES

- 11 Delphi Save A Lot Food & Grocery
- 12 Camden 218 Market
- 13 Camden Dollar General
- 14 Flora SUPERVALU
- 15 Burlington Dollar General

PARKS & ATHLETIC FIELDS (ADDITIONAL RECREATION AREAS ARE HIGHLIGHTED IN GREEN)

- 16 Carroll County Golf Course
- 17 Paul Goyer Little League Baseball Field
- 18 Angel Hill Golf Park

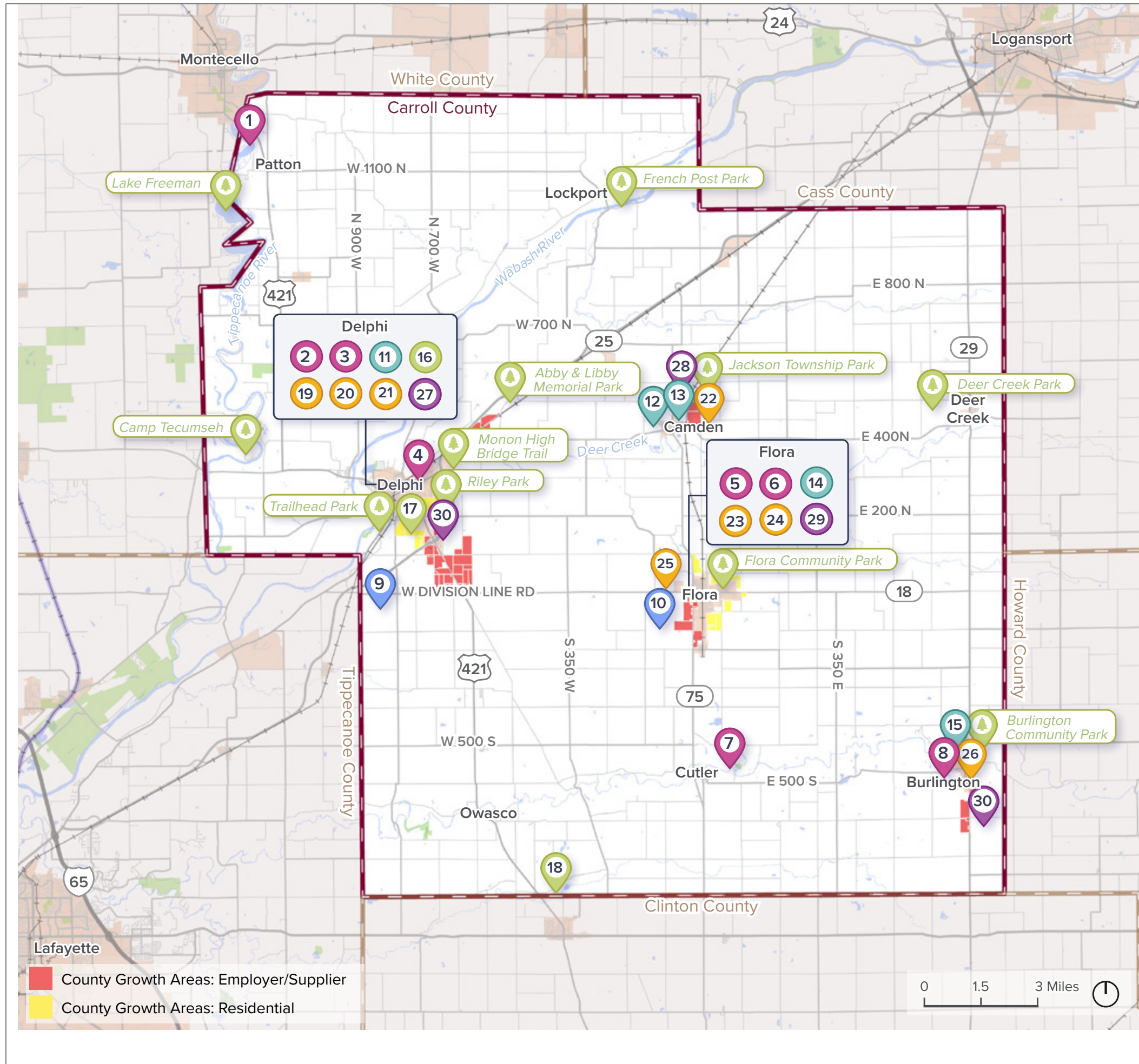
SCHOOLS & EDUCATION CENTERS

- 19 Delphi Community Elementary, Middle and High School
- 20 Delphi Adult Education
- 21 Delphi Public Library
- 22 Camden Public Library
- 23 Carroll Consolidated Elementary, Junior, and Senior High School
- 24 Flora Public Library
- 25 Children's Garden Early Childhood Care & Education Center
- 26 Burlington Public Library

HOSPITALS & HEALTHCARE

- 27 St Elizabeth Healthcare Campus
- 28 Camden Health Center
- 29 Flora Family Medicine
- 30 Family Health Clinics of Carroll County

- County Growth Areas: Employer/Supplier
- County Growth Areas: Residential
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SEMICONDUCTOR INDUSTRY GROWTH AREA READINESS SUMMARY

Carroll County could position itself to take advantage of its relative proximity to Tippecanoe County and continue to double down on the fact that many policy and infrastructure investments have been accomplished/planned in recent years. While all the areas identified have strengths, an abundance of acres was included in this study for residential and employer/supplier development. Carroll County officials should examine the identified areas and determine which are ripe for development in the next three years. Determining one or two priority sites most likely to benefit from continued investment in the semiconductor supply chain would be advisable. Specifically, suppose Carroll County officials are interested in attracting more intensive upstream business types. In that case, they will need to identify and expand water treatment plants to provide hundreds of thousands of gallons of water per day to one or more of the identified employer/supplier sites, leaving enough capacity to spur residential development.

The following details are the strengths and weaknesses of each growth area, which were developed to help begin the prioritization process:

DELPHI AREA

Strengths:

- ▶ Proximity to SK hynix: A 26-minute drive to the site, with excellent connectivity via the Hoosier Heartland Highway (SR 25).
- ▶ Existing development plans: The Burnbrae Farms Sub-Area Plan supports residential growth, with 463 acres already zoned for urban residential use.
- ▶ Amenities and attractions: The area features historic sites like the Delphi Opera House, the Wabash and Erie Canal, and recreational trails, which enhance the quality of life.
- ▶ TIF districts: Portions of the area fall within TIF districts, aiding infrastructure funding.
- ▶ Existing water and sanitary infrastructure can accommodate residential growth.

Weaknesses:

- ▶ Zoning adjustments needed: Most employer/supplier growth areas are zoned agricultural, requiring rezoning for industrial use.
- ▶ Utility gaps: Some growth areas lack water and sanitary infrastructure, necessitating extensions. Water and sewer treatment facilities' capacities are undersized for large water upstream suppliers.
- ▶ GIS mapping limitations: Absence of detailed GIS data complicates infrastructure planning.

CAMDEN AREA

Strengths:

- ▶ Rail access: The JNT Farms site is rail-served, making it attractive for supply chain businesses.
- ▶ Strategic location: Accessible via SR 218 and situated between US 421 and the Hoosier Heartland Highway, with a 43-minute commute to SK hynix.
- ▶ Existing zoning: Some parcels allow manufacturing uses under notable exceptions.

Weaknesses:

- ▶ Utility limitations: Water and sanitary infrastructure do not currently extend to identified growth areas.
- ▶ Zoning challenges: Growth areas are zoned agricultural, requiring updates to accommodate industrial development.
- ▶ Infrastructure needs: Rail crossings and utility extensions are necessary for readiness.

FLORA AREA

Strengths:

- ▶ Residential growth potential: Identified 344 acres for residential development, with many parcels already zoned for urban residential use.
- ▶ TIF districts: Growth areas benefit from existing TIF districts to support development.
- ▶ Community Amenities: Proximity to schools, a library, and downtown Flora enhances livability.

Weaknesses:

- ▶ Zoning adjustments needed: Some employer/supplier sites are zoned agricultural and require rezoning for industrial use.
- ▶ Utility data gaps: Lack of detailed utility mapping hinders readiness assessments.
- ▶ Commute distance: A longer commute of 40 minutes to SK hynix.

BURLINGTON AREA

Strengths:

- ▶ Residential development opportunities: Identified 124 acres for residential growth, with parcels zoned for urban residential use.
- ▶ Strategic location: Positioned near SR 29, with a 50-minute commute to SK hynix.
- ▶ TIF districts: Growth areas include parcels within TIF districts, supporting infrastructure improvements.

Weaknesses:

- ▶ Utility deficiencies: No existing water infrastructure; reliance on groundwater wells and septic systems limits development potential.
- ▶ Zoning challenges: Employer/supplier sites are zoned agricultural and require rezoning for industrial use.
- ▶ Infrastructure needs: Significant investment in water and sanitary systems is required to support growth.

CARROLL COUNTY RECOMMENDATIONS

The following recommendations for Carroll County are based on the overall analysis of this study and are presented in chronological order to support employer/supplier and residential growth over the next three to five years, following the launch of SK hynix's facility. Successful implementation will require coordinated efforts among local, county, and state officials—including those in planning, zoning, infrastructure, and economic development.

RECOMMENDATION #1 – UPDATE THE COUNTY'S BEACON ONLINE GIS PLATFORM

Carroll County's first recommendation to implement is to review and update the County's Beacon Online GIS Platform to create more information that site selectors can use. The County has done a lot to create development-ready parcels, which are not showcased on this site. Minimally including the following:

- ▶ Add all the TIF boundaries in the county to the Beacon online GIS platform. Currently, only one is shown, and no other publicly available mapping exists.
- ▶ The county zoning layer also shows the "city" zoning layers, which can be confusing when both city and county layers are turned on. The district names are accurate, but the two layers' different color schemes make identifying the proper zoning more difficult. Also, the zoning designations for the Town of Flora are not visible.
- ▶ Add utility information, where available, to help site selectors research

CARROLL COUNTY RECOMMENDATION #2 - UPDATE THE COUNTY'S COMPREHENSIVE PLAN FUTURE LAND USE MAP.

Next, the County should update its policy documents. While researching the identified growth areas, it was noted that some locations, including those actively marketed, are not designated for the intended use in the comprehensive plan. Therefore, this document's future land use map should be updated minimally to reflect desired future development

land uses. This would be a significant first step to ensure that the community is aware of these potential changes and that there is general agreement on their location. Since there are existing sites planned and zoned for the uses identified in this study, this step will help bring the next Hoosier Heartland Industrial Park or Burnbrae Farms developments into focus.

CARROLL COUNTY RECOMMENDATION #3 – DEVELOP A LIST OF PRIORITY GROWTH PARCELS, BEYOND THIS STUDY'S RESEARCH, TO FOCUS ATTRACTION EFFORTS FOR THE NEXT THREE TO FIVE YEARS.

In conjunction with recommendation #2, county and town officials should come together and determine which locations will be the following development parcels once the Hoosier Heartland Industrial Park and Burnbrae Farms are built. The following criteria will help with the process:

- ▶ Review the strengths and weaknesses in this document and focus on the properties that are already entitled for the growth area type of development identified in this study.
- ▶ Update the Carroll County Comprehensive Plan Future Land Use Map to reflect these new priorities.
- ▶ Create digital mapping for existing utilities, such as sanitary, water, and electric.
- ▶ Create Residential TIFs to support these development areas and shorten the fuse for developers looking to build homes in identified locations (See Appendix C for more information about Residential TIFs).

CARROLL COUNTY RECOMMENDATION #4 – REVIEW AND UPDATE THE COUNTY'S ZONING ORDINANCE

Carroll County's last complete zoning update was in 1971. A review of this document illustrates that the following items should be addressed to help the development community in the near term stimulate development in the growth areas:

- ▶ Update the zoning ordinance document into an easier-to-read PDF with searchable text, directly linked from Carroll County's official website. The current online copy is scanned in multiple orientations, making it difficult to locate or search for information related to each zoning district.
- ▶ A complete code audit should ensure that existing lot size, use standards, and special exception uses align with the current elected officials' and stakeholders' sentiments. Using this audit and zoning ordinance amendments to reduce the time it takes for developers of already entitled property to receive building permits will assist in creating a development-friendly environment.

CARROLL COUNTY RECOMMENDATION #5 – CREATE A CAPITAL IMPROVEMENT PLAN AND PROGRAM (CIPP)

The prioritization effort in Recommendation #3 should be coordinated to ensure future county and town infrastructure improvements, county officials should create a CIPP document to guide future infrastructure improvement decisions. The improvements should be coordinated with the county's needs, and high-priority development sites should be moved towards shovel-ready status. See Appendix C for a more detailed description of CIPP documents.

CARROLL COUNTY SUCCESS METRICS

- ▶ Workforce Attraction: Increase county job postings in advanced manufacturing by 15 percent annually.
- ▶ Housing Expansion: Approve 700+ new housing units by 2030.
- ▶ TIF Activation: Establish two new residential TIF districts by 2027.
- ▶ GIS Transparency: Launch interactive online GIS mapping for site selection by Q1 2026.