Recommendations & Major Findings

- Nevada's Congressional delegation should immediately and aggressively pursue changes to federal law included in the Southern Nevada Economic Development and Conservation Act to expand Southern Nevada's disposal boundary.

- Southern Nevada will face a land shortage, stunting economic development around 2030 if nothing is done to expand regional access to lands; sooner if the BLM fails to release lands as needed.

- There are roughly 19,100 gross acres of developable employment land in 198 parcels of 20+ acres remaining in Clark County.

- Approximately 9,700 of those acres are most optimal for development. Includes federally-owned parcels that have not yet been released under SNPLMA.

- The region is projected to require about 14,100 acres of developable employment land to meet the needs of the expected economic and job growth by 2035.

- Based on the estimated 9,700 acres noted above, there would be a deficit of 4,400 acres.

- Failing to ensure an adequate supply of employment land could lead to a reduction in an yrly. gross regional product growth from 2.8 percent per year to 1.5 – 2.0 percent per year.

Three Forecast Scenarios Developed (2018 – 2035)

- **Base-Case (No land constraints)**
  - 3% cost disadvantage (due to land constraints)
  - 5% cost disadvantage (due to land constraints)

**Economic Output Impact**

- **Base-case:** Average yrly. growth rate: 2.8% or $119.4 billion reaching $318.3 billion in 2035
  - 3% cost disadvantage: Avg. yrly. growth rate: 1.9%
    - Growth reduction over Study Period: $43.6 billion or by 13.7%
  - 5% cost disadvantage: Avg. yrly. growth rate: 1.3%
    - Growth reduction over Study Period: $69.5 billion or by 21.8%

**Job Impact**

- **Base-case:** Avg. yrly. growth rate: 1.9% or 504,000 jobs reaching 1.8 million in 2035
  - 3% cost disadvantage: Avg. yrly. growth rate: 1.2%
    - Growth reduction over Study Period: 204,800 jobs or by 11.3%
  - 5% cost disadvantage: Avg. yrly. job growth rate: 0.7%
    - Growth reduction over Study Period: 329,100 jobs or by 18.1%

**Earnings (Wages and Business Income) Impact**

- **Base-case:** Avg. yrly. growth rate: 2.8% or $40.4 billion reaching $109.1 billion in 2035
  - 3% cost disadvantage: Avg. yrly. growth: 2%
    - Growth reduction over Study Period: $12.2 billion or by 11.1
  - 5% cost disadvantage: Avg. yrly. labor income growth: 1.6%
    - Growth reduction over Study Period: $19.5 billion or by 17.9%

**Gross Regional Product Impact**

- **Base-case:** Avg. yrly. growth rate: 2.8% or $71.7 billion reaching $191.3 billion in 2035
  - 3% cost disadvantage: Avg. yrly. growth: 2%
    - Growth reduction over Study Period = $22.5 billion or by 11.8%
  - 5% scenario disadvantage: Avg. yrly. growth: 1.5%
    - Growth reduction over Study Period = $36.1 billion or by 18.9%

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