

Advisory Team Briefing

2nd Quarter 2025

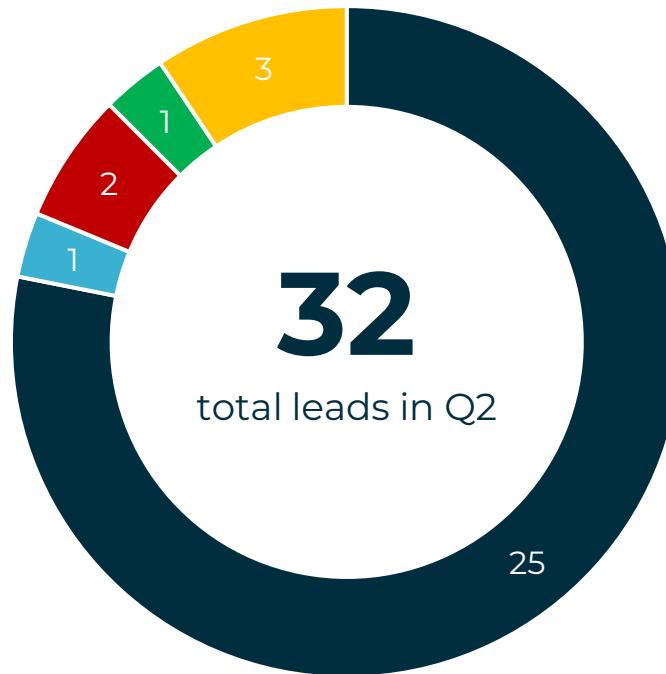
Q2 2025 Advisory Report

Pipeline Report

Advisory Team Briefing | 2nd Quarter 2025

New Leads by Industry

Q2 2025 | APR 1 – 30 JUN



Q2 2025

- 32 leads for Q2
- 10 leads converted to projects
- 78% of leads in manufacturing

3-year Averages

- Avg. quarterly lead count is 46
- Avg. quarterly lead mix has been 75% manufacturing

■ Manufacturing ■ Tech
■ Bioscience ■ Aviation
■ Other ■ Other

Lead Disqualification

Q2 2025 | APR 1 – 30 JUN

- Large power requirements
- Lack of large real estate options (both existing buildings and greenfield sites)
- Lots of projects require deepwater port access/specific logistical requirements

Reason Disqualified	
Reason	Number of DQ factors
Real Estate	19
Logistics	7
Rail	2
High utility use	8
Strategic fit (ex: pollution)	4
Other	4

Real Estate Disqualification

Existing Building (Industrial)	Land
50,000 SF standalone existing building with 500 MW power and active rail spur	15 acre greenfield for explosive and weapons testing range
890,000 SF existing building	350+ acres collocated with oil refinery and within 5 miles of deepwater port
2.2M SF existing building with a significant land buffer from non-industrial real estate	25 acre greenfield with active rail spur
35,000 SF existing building with 50+ foot ceilings and capable of accommodating a heavy gas stack	15 acres within 100 miles of deepwater port

Project Pipeline by Industry

Q2 2025 | APR 1 – 30 JUN



Active Projects

- 82% of projects in manufacturing
- 12 site visits year-to-date
- Four Projects in advanced stages of negotiation:
 - 3 Manufacturing
 - 1 Other (Leisure/Entertainment)

Over the past 3 years, 77.4% of active projects are in manufacturing

- Manufacturing
- Bioscience
- Aviation
- Tech
- Other
- Headquarters

Active Projects

Ongoing

Project Name	Project Description & Status Update	Lead Source	Capital Investment	New Jobs	Stage
Ellie	Manufactures plastic blow molding of fuel tanks. Incentives approved by the NBEDC July 2025. Project in advanced negotiation stages.	Greater: SATX	\$25,000,000	150	Negotiation
Nemo	Local expansion driven by increased demand for product and new contract with innovative technology company. Incentive negotiations ongoing.	BRE – Local Expansion	\$100,000,000	100	Negotiation
Sun	U.S. based solar cell and module manufacturing company. This is a complex, multiphase project. Project originally placed on hold due to tariffs/regulatory environment changes but has recently been reactivated.	Company	\$804,000,000	300	Short Listed

Marketing Activity

Q2 2025 – Recruitment Missions & Advertising

Date	Event	Staff Attended	Target Audience
May 2025	SelectUSA Investment Summit	TK	Foreign Direct Investment

SelectUSA Summit



Print & Digital Advertisements

Q2 EDC Project Discussion Recap

Project	Project Description	\$ Amount
Northeast Lakeview College	Incentive to assist Northeast Lakeview College with campus construction to activate future expansion for NLC at new site and TSTC at CTTC when that location is vacated.	\$3,800,000
Project Ellie	Economic development incentive (tax abatement) for corporate relocation creating 150 new jobs in advanced manufacturing.	\$950,000
Dry Comal Creek Floodplain Project	Funding a study for new floodplain assessments for the Dry Comal Creek.	\$240,000

Business Retention and Expansion (BRE)

Q2 2025 – Meetings and Services Provided

24 BRE Visits

(43 to date)

- Schlitterbahn
- Detex
- Zoho
- ValMark
- Edenhill
- Graybrook
- Mission Dental

Assistance/Services Provided

- 10 Workforce
- 3 Data/Resources
- 9 Business Development Connections

Business Retention and Expansion (BRE)

Q2 2025 – Workforce Activity

Milestones

- 2025 TEDC Workforce Excellence Award
- 2025 TEDC Regional Merit Workforce Excellence Award
- 2025 Workforce Solutions Alamo Regional Partnership Impact Award
- 2025 Teacher Externship Program, 20 teachers and 6 local employers
- Greater New Braunfels Job Fair, 53 Employers, 381 job seekers in attendance
- Spring Regional Job Fair, 27 Employers, 182 Job Seekers
- First TSTC/FAME Graduation of Advance Manufacturing Technicians
- Skillpoint Alliance officially opened a New Braunfels location at the TSTC campus

Confluence Mid-course Assessment

Recommendations

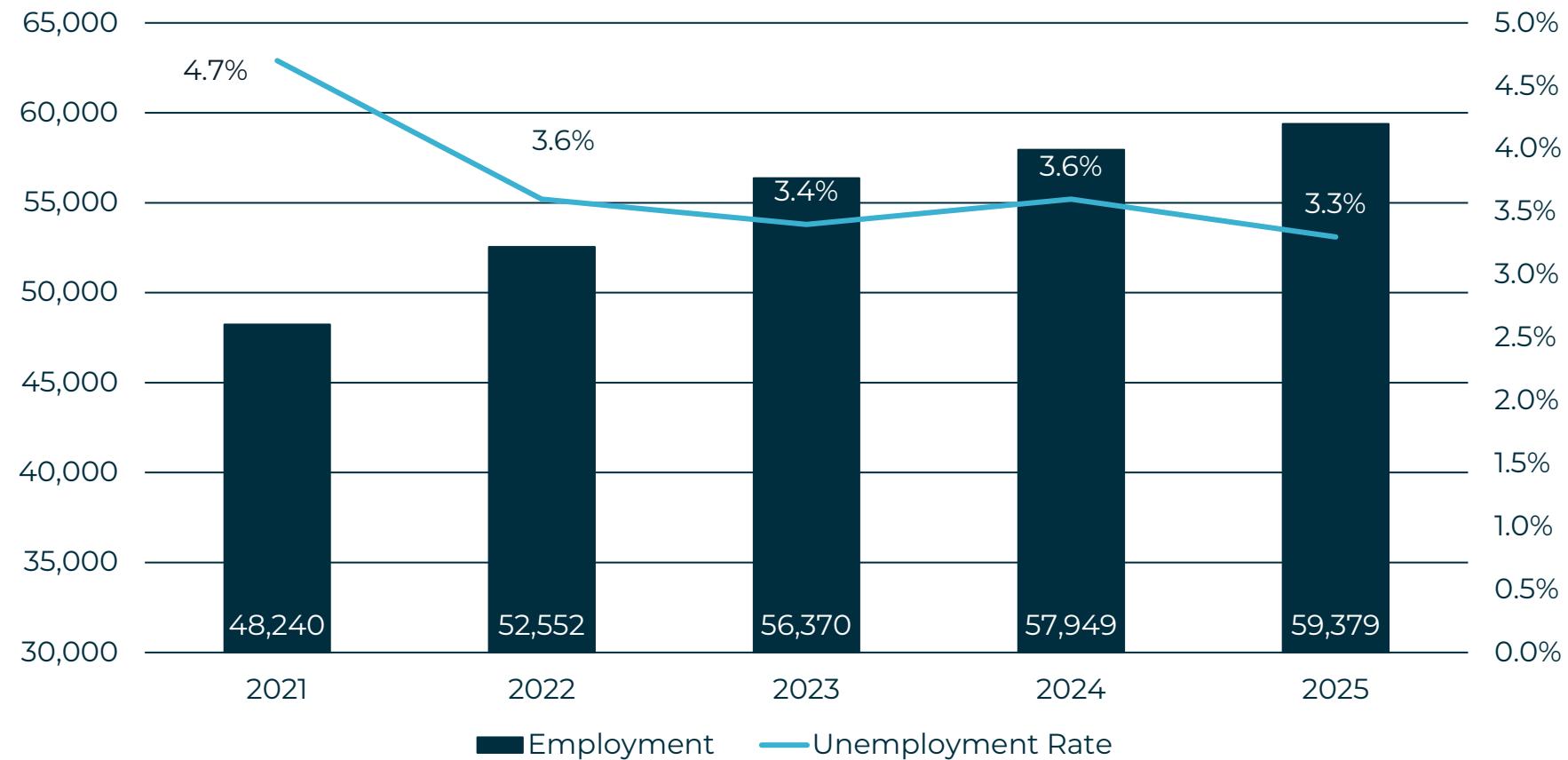
- Refocus Business Retention & Expansion (BRE) efforts to prioritize higher-level engagement with executive level decision makers.
- Develop a comprehensive site readiness plan
- Work with the Early Childcare Advisory group to support the implementation of recommendations from Early Matters SA.
- Expand entrepreneurship programing by identifying and preparing fundable opportunities for the EDC to consider
- Establish and mobilize the SH46 task force to advocate for accelerating the expansion of SH46 from I35 to I10.

Economic Indicators

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New Braunfels Employment

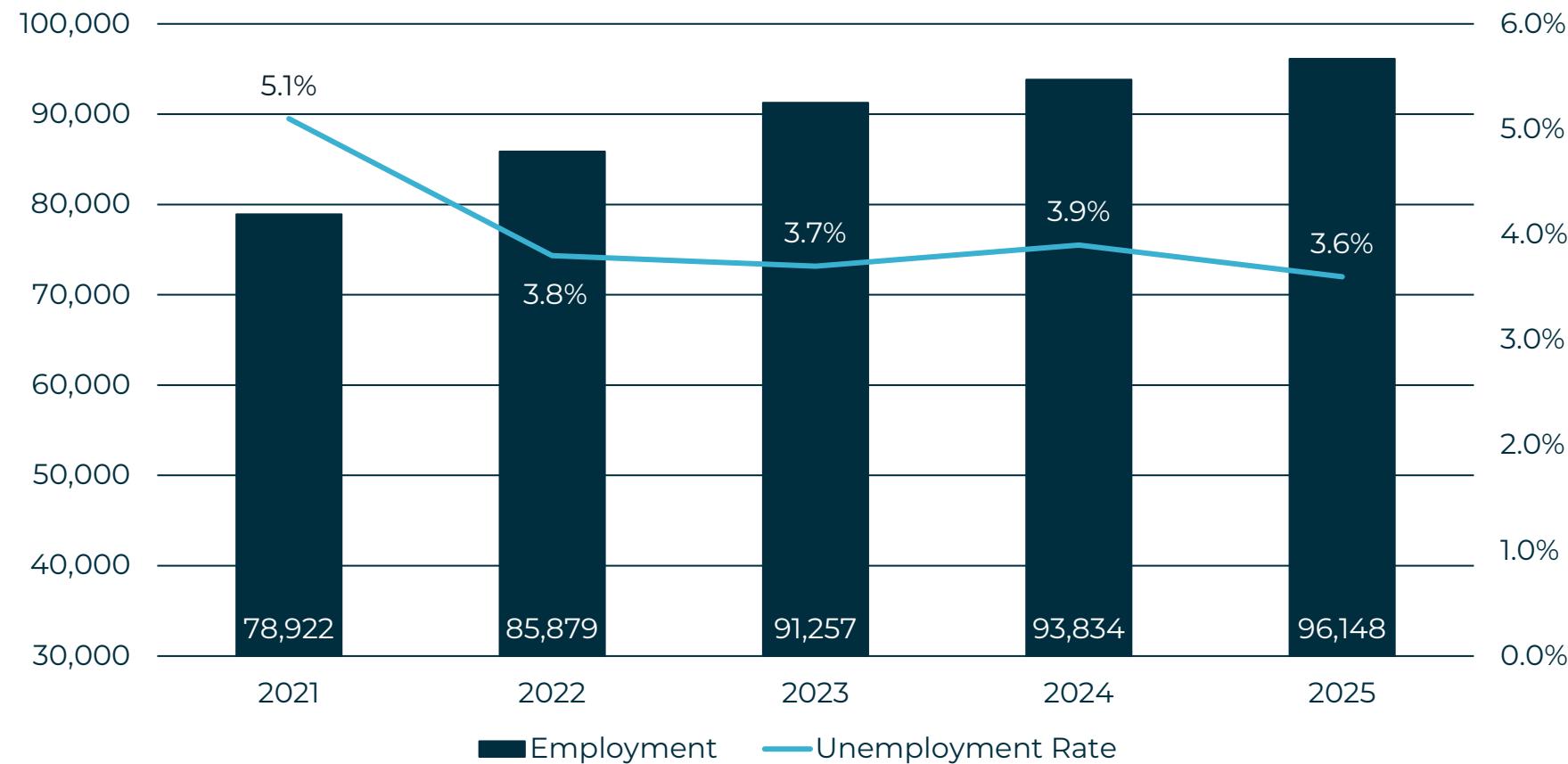
June 2021 - 2025



Source: Texas LMI LAUS

Comal County Employment

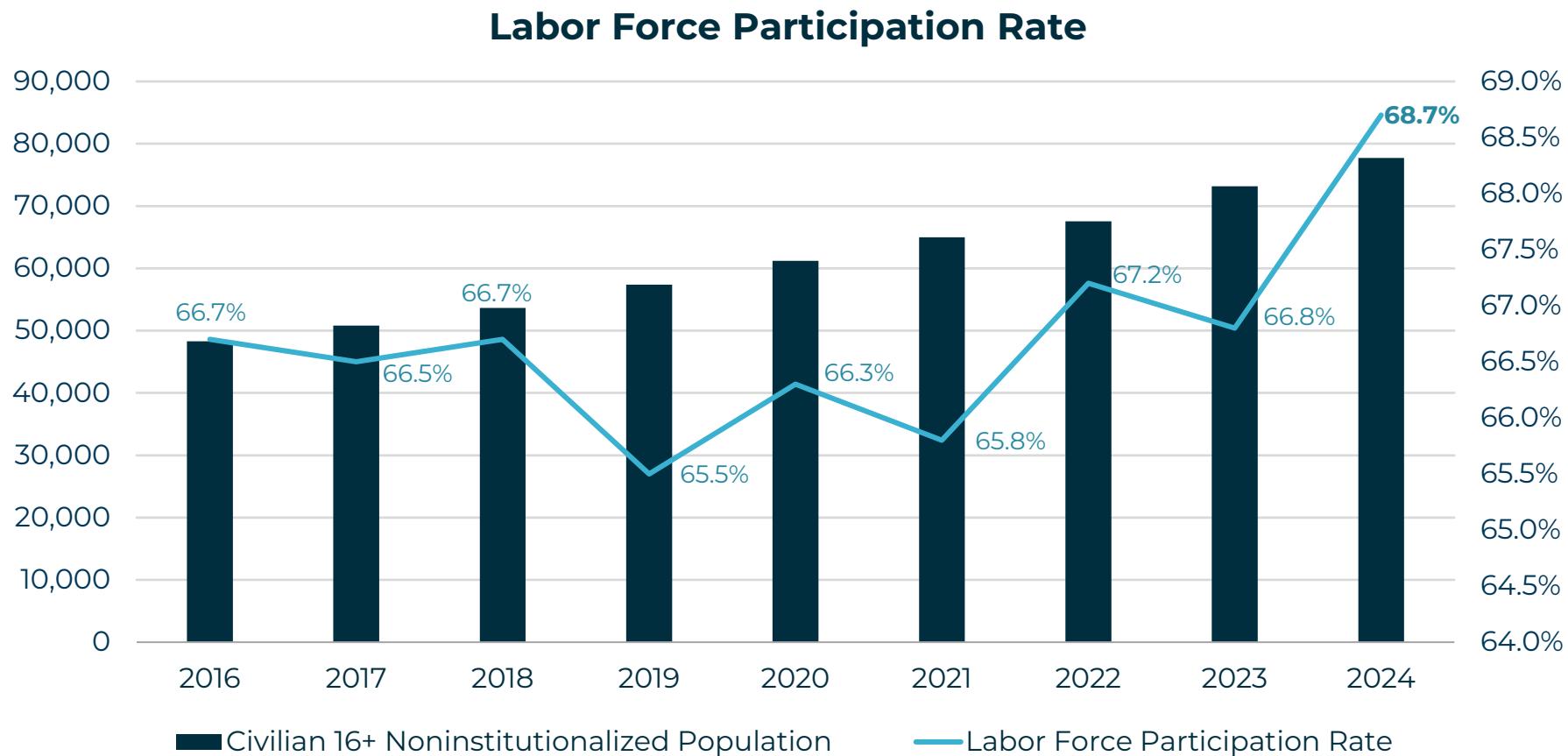
June 2021 - 2025



Source: Texas LMI LAUS

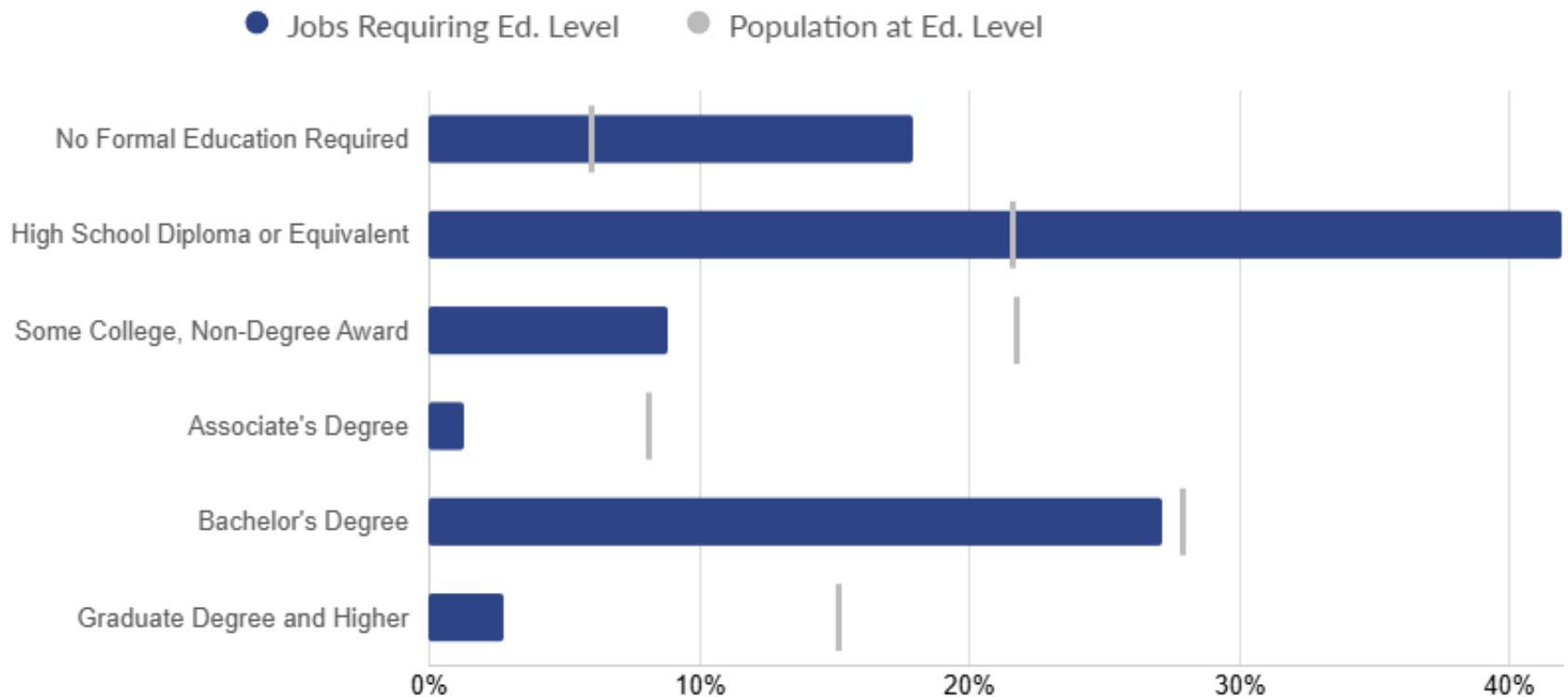
Labor Force Participation Rate

New Braunfels | 2016-2024 Annual



Source: Texas LMI, U.S. Census, New Braunfels Chamber

Underemployment



Source: Lightcast

Job Posting Analytics

18,255

Unique Postings

38,810 Total Postings

2,333

Employers Competing

2,333 Total Employers

27 Days

Median Posting Duration

Regional Average: 27 Days

2 : 1

Posting Intensity

Regional Average: 2 : 1

▲23.1% Aug 2022 – Jul 2025

\$41.2k Median



Source: Lightcast

19,295 Job Postings

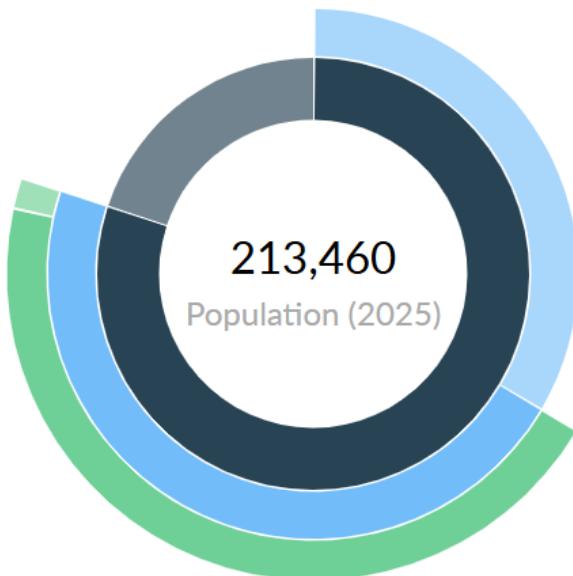
Top Posted Occupations

Occupation (SOC)	Total/Unique (August 1, 2024 - July 31, 2025)	Posting Intensity	Median Posting Duration
Registered Nurses	5,792 / 1,775	3 : 1	21 days
Retail Salespersons	1,401 / 603	2 : 1	30 days
Heavy and Tractor-Trailer Truck Drivers	713 / 391	2 : 1	31 days
Customer Service Representatives	838 / 382	2 : 1	24 days
Home Health and Personal Care Aides	690 / 336	2 : 1	35 days
First-Line Supervisors of Retail Sales Workers	632 / 276	2 : 1	27 days
Maintenance and Repair Workers, General	557 / 275	2 : 1	33 days
Medical Assistants	572 / 248	2 : 1	26 days
Laborers and Freight, Stock, and Material Movers, Hand	523 / 230	2 : 1	24 days
Health Technologists and Technicians, All Other	472 / 214	2 : 1	30 days

Source: Lightcast

Labor Force Breakdown

Comal County, June 2025



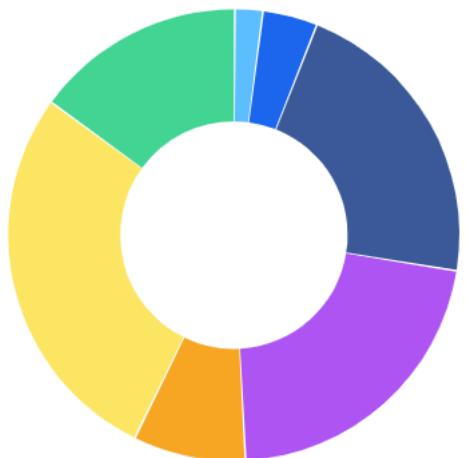
	Population
● 16+ Civilian Non-Institutionalized Population ?	170,744
● Not in Labor Force (16+) ?	71,428
● Labor Force ?	99,316
● Employed ?	95,837
● Unemployed ?	3,479
● Under 16, Military, and institutionalized Population	42,716

Source: Lightcast

Educational Attainment

Comal County, June 2025

Concerning educational attainment, 27.8% of Comal County, TX residents possess a Bachelor's Degree (6.3% above the national average), and 8.0% hold an Associate's Degree (0.8% below the national average).

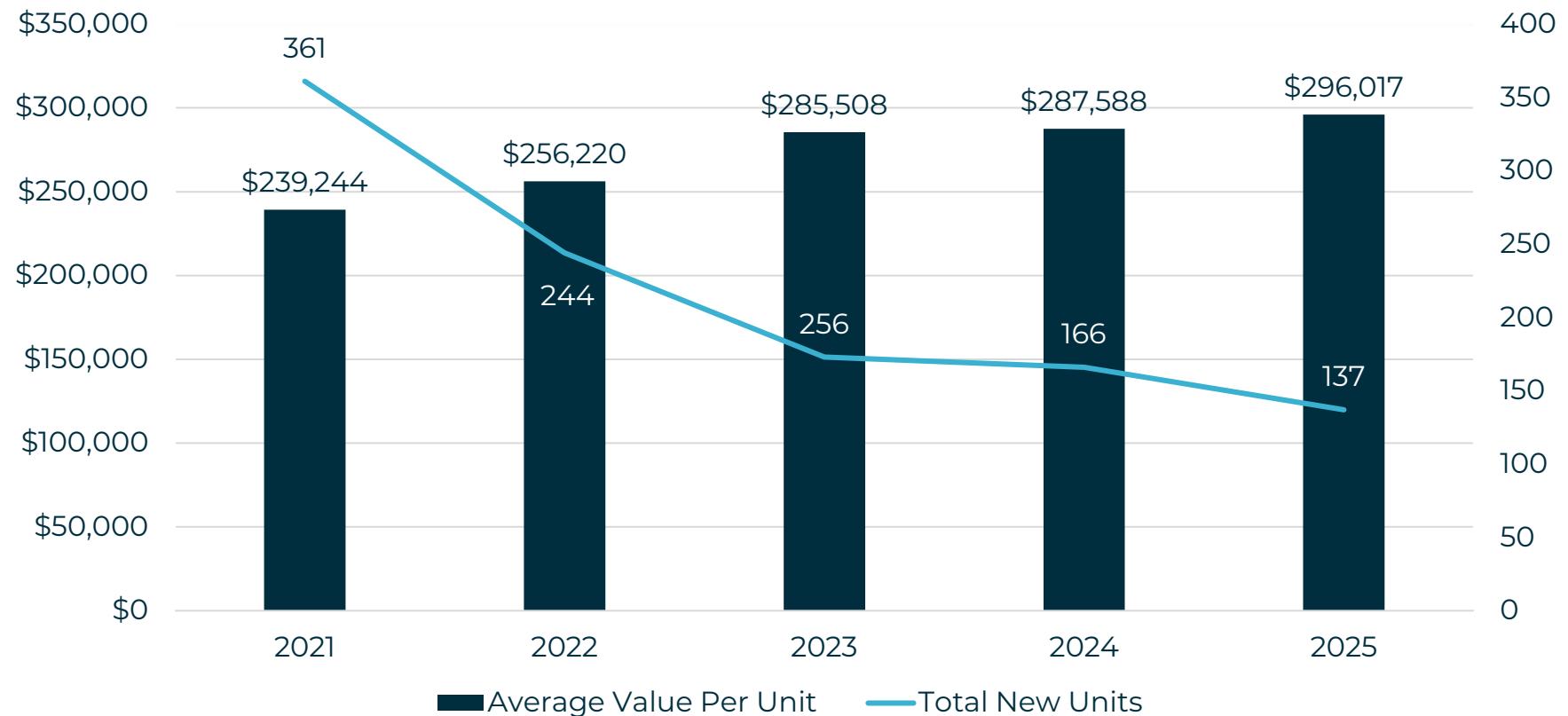


	% of Population	Population
Less Than 9th Grade	2.0%	2,885
9th Grade to 12th Grade	3.9%	5,670
High School Diploma	21.5%	31,105
Some College	21.6%	31,271
Associate's Degree	8.0%	11,623
Bachelor's Degree	27.8%	40,130
Graduate Degree and Higher	15.1%	21,757

Source: Lightcast

Comal County Septic Permits

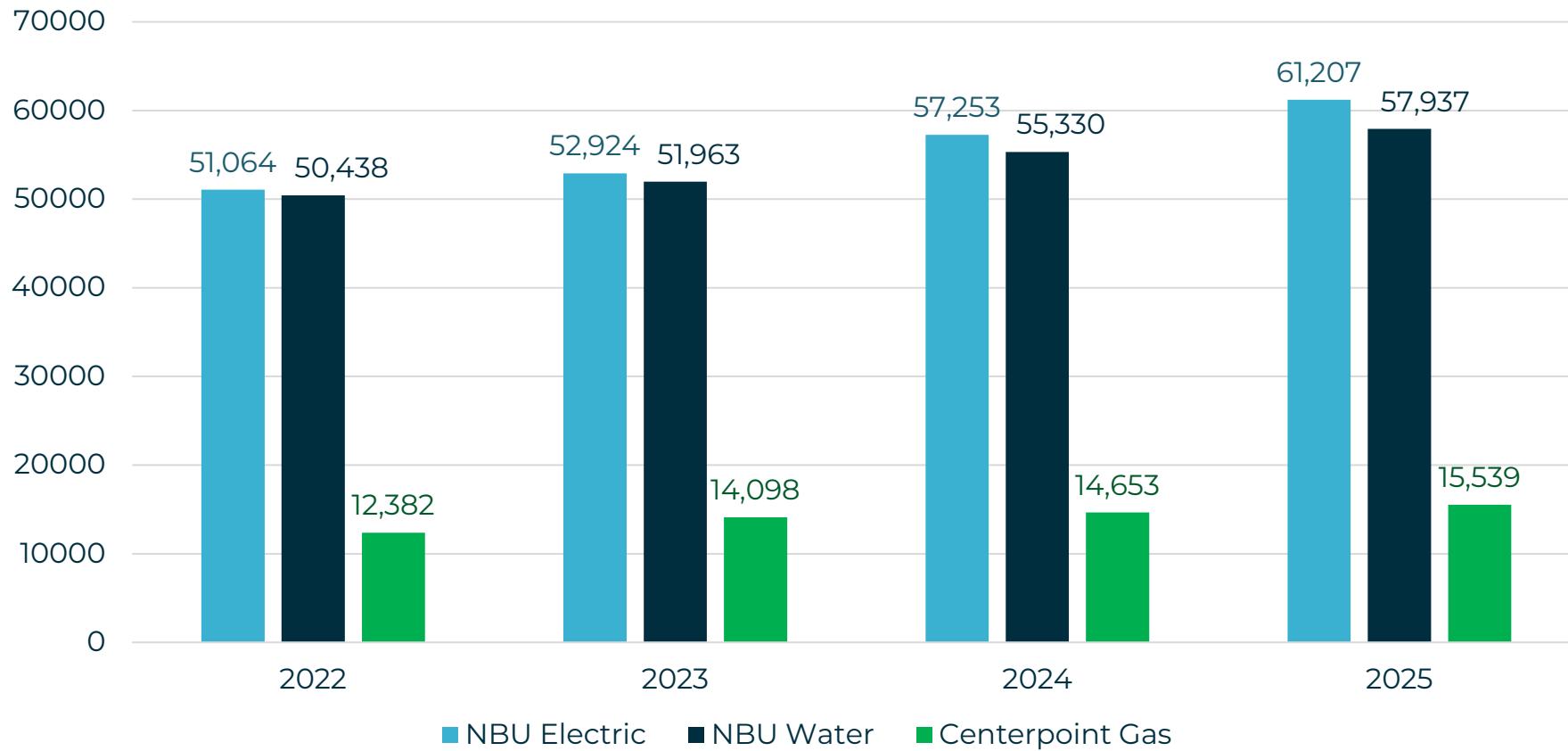
June 2021 – June 2025



Source: Texas A&M Real Estate Research Center

Utilities customers

May 2022 – May 2025



Source: NBU and Centerpoint Energy