

Advisory Team Briefing

3rd Quarter 2025

Q3 2025 Advisory Report

Pipeline Report

Advisory Team Briefing | 3rd Quarter 2025

New Leads by Industry

Q3 2025 | JUL 1 – 30 SEP



Q3 2025

- 33 leads for Q2
- 11 leads converted to projects
- 67% of leads – manufacturing

YTD: 73 Leads (JAN 1 – 30 SEP)

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

Lead Disqualification

Q3 2025 | JUL 1 – 30 SEP

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

Reason Disqualified	
Reason	Number of DQ factors
Real Estate	18
Logistics	5
Rail	4
High utility use	7
Strategic fit	3
Other	2

Project Disqualifications (based on real estate solution)	
Existing Buildings	Land
250,000+ SF existing building with at least an 80’ ceiling and at least 75’ column spacing	50 acres with immediate 75MW power capacity with ramp up to 500+ MW
Existing building with at least 100,000 SF of cold storage	30 acre greenfield with deepwater port siding required
15,000 SF existing building within 60 minutes of a deepwater port and active rail spur or rail siding	250+ acres with direct access to intermodal train and special air pollution requirements
50-150K SF existing building with rail spur and donation of real estate as part of incentive package	1,000+ acres for explosives and hazardous materials product testing

Project Pipeline by Industry

Q3 2025 | JUL 1 – 30 SEP



63
Active
Projects

Active Projects

- 81% of projects in manufacturing
- 14 site visits year-to-date

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

Project Wins

Q3 Project Wraps

Project Name	Project Description & Status Update	Lead Source	Capital Investment	New Jobs	Stage
Ellie (Lefko USA)	Manufactures plastic blow molding of fuel tanks. Incentives approved by the NBEDC July 2025. Project in advanced negotiation stages.	Greater: SATX	\$20,000,000	150	Announced
Nemo (Aumovio, formerly Continental)	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	Announced

Marketing Activity

Q3 2025 – Recruitment Missions & Advertising

Date	Event	Staff Attended	Target Audience
07/25	Consultant Connect Chicago	Michele Boggs	Corporate Site Selectors
08/25	Team Texas Consultant Summit	Mike Crowley	Corporate Site Selectors
09/25	TBIC Germany Trade Mission	Michele Boggs	Foreign Direct Investment



Business Retention and Expansion (BRE)

Q3 2025 – Meetings and Services Provided

13 BRE Visits

(66 to date)

- PAKMULE
- U.S. Aviation
- Tristar
- Champion Nissan
- Faust Hotel
- McCoys
- Christian Brothers
- Stoke Factory
- AnswerBase
- Rareform Agency
- Roberts Obrien
- Seagull PME

Assistance/Services Provided

- 5 Workforce
- 2 Data/Resources
- 10 Professional connections

Business Retention and Expansion (BRE)

Q3 2025 – Workforce Activity

Milestones

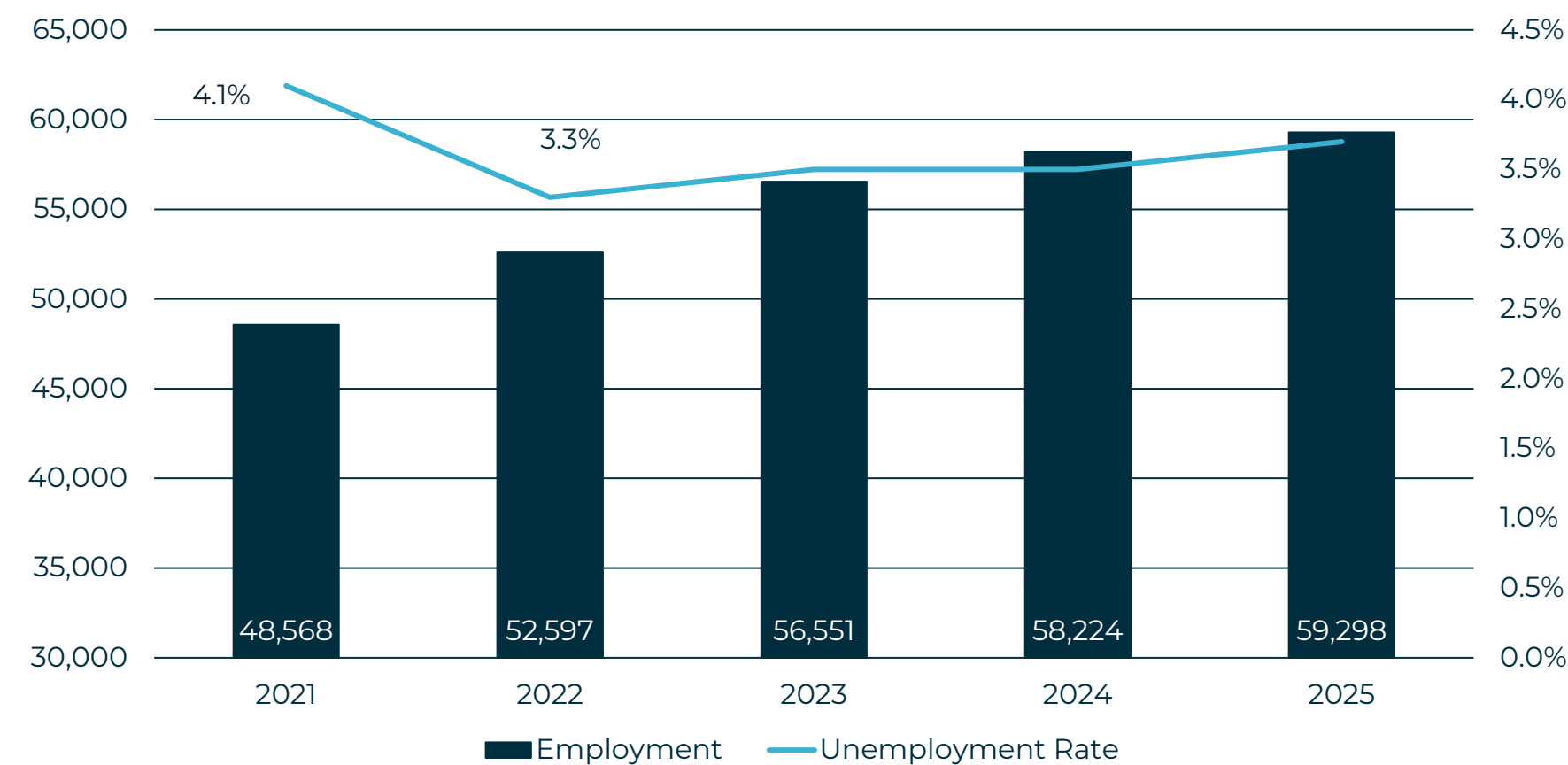
- Completed Home to Texas Internship Program through the University of Texas
- 23rd Annual Teacher of the Year Back to school Luncheon, honored 21 area Teachers of the Year
- Held two regional employer convenings, provided information on starting registered apprenticeships
- Partnered with NBMA and SAMA for a regional state of manufacturing event, over 400 in attendance
- Summer Regional Job Fair, 30 Employers, 153 Job Seekers
- First TSTC Graduation (non-FAME), 52 students graduated from 2 programs.

Economic Indicators

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New Braunfels Employment

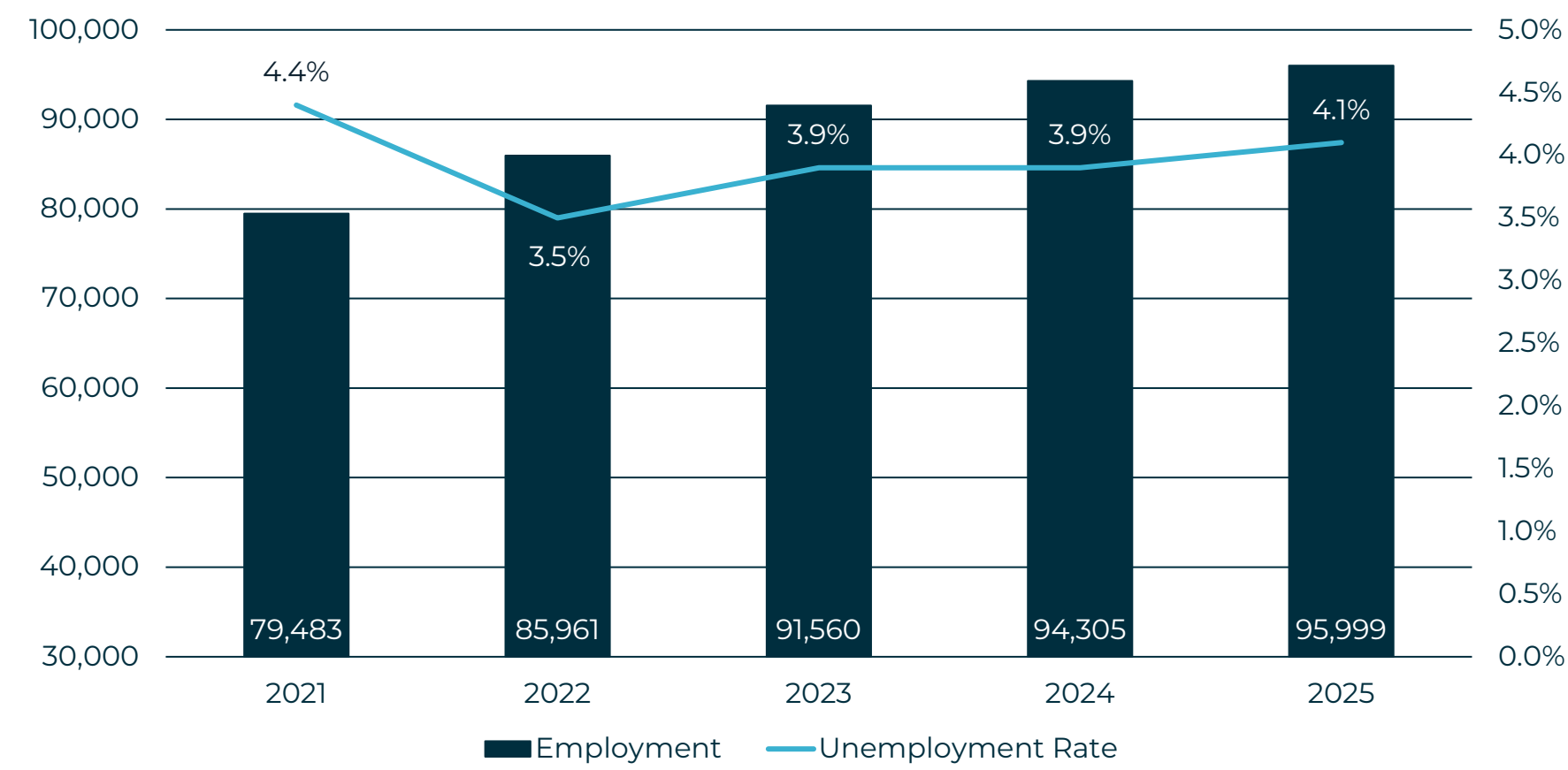
August 2021 - 2025



Source: Texas LMI LAUS

Comal County Employment

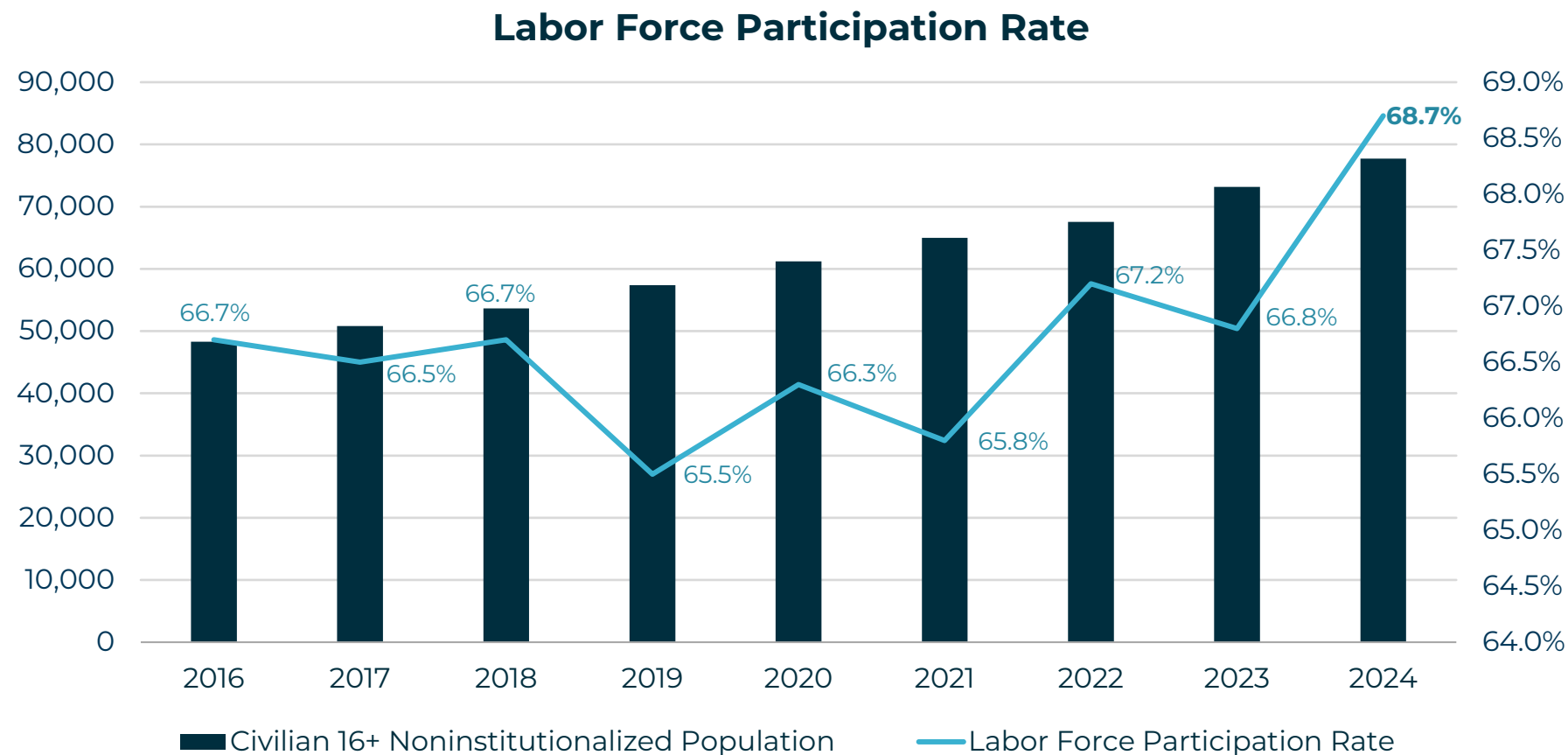
August 2021 - 2025



Source: Texas LMI LAUS

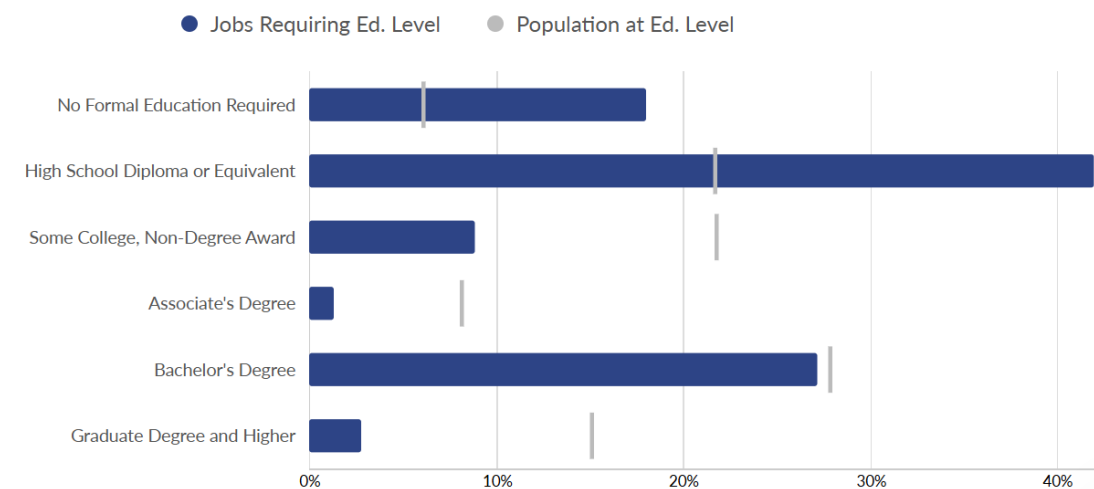
Labor Force Participation Rate

New Braunfels | 2016-2024 Annual



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

Underemployment



Education Level	Jobs Requiring Ed. Level	Population at Ed. Level	Difference
No Formal Education Required	18%	6%	12%
High School Diploma or Equivalent	42%	22%	20%
Some College, Non-Degree Award	9%	22%	-13%
Associate's Degree	1%	8%	-7%
Bachelor's Degree	27%	28%	-1%
Graduate Degree and Higher	3%	15%	-12%

Source: Lightcast

Job Posting Analytics

4,879

Unique Postings ?
10,031 Total Postings

1,148

Employers Competing ?
1,148 Total Employers

20 Days

Median Posting Duration ?
Regional Average: 20 Days

2 : 1

Posting Intensity ?
Regional Average: 2 : 1



▲24.6% Nov 2022 – Oct 2025
\$41.7k Median

6M 1Y 3Y CUSTOM



Source: Lightcast

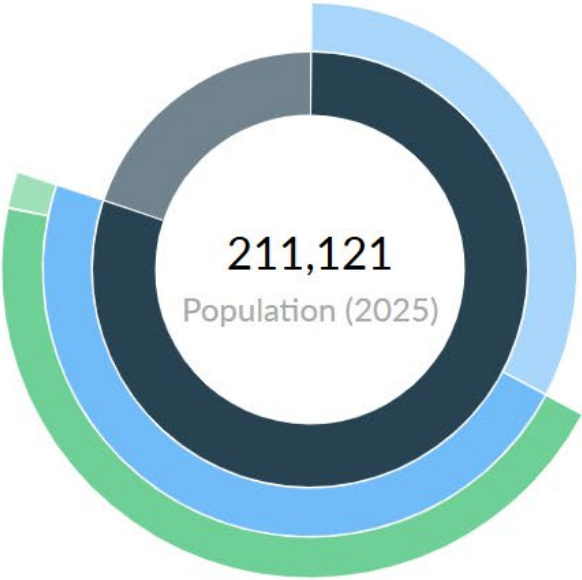
Top Posted Occupations

Occupation (SOC)	Total/Unique (Jul 2025 - Sep 2025)	Posting Intensity	Median Posting Duration
 Registered Nurses	2,020 / 708	3 : 1 	17 days
 Retail Salespersons	331 / 155	2 : 1 	24 days
 Heavy and Tractor-Trailer Truck Drivers	200 / 115	2 : 1 	23 days
 First-Line Supervisors of Retail Sales Workers	169 / 96	2 : 1 	23 days
 Customer Service Representatives	213 / 95	2 : 1 	21 days
 Home Health and Personal Care Aides	216 / 85	3 : 1 	32 days
 Licensed Practical and Licensed Vocational Nurses	167 / 77	2 : 1 	18 days
 Radiologic Technologists and Technicians	212 / 76	3 : 1 	17 days
 Health Technologists and Technicians, All Other	136 / 68	2 : 1 	20 days
 Medical and Health Services Managers	131 / 65	2 : 1 	22 days

Source: Lightcast

Labor Force Breakdown

Comal County, June 2025



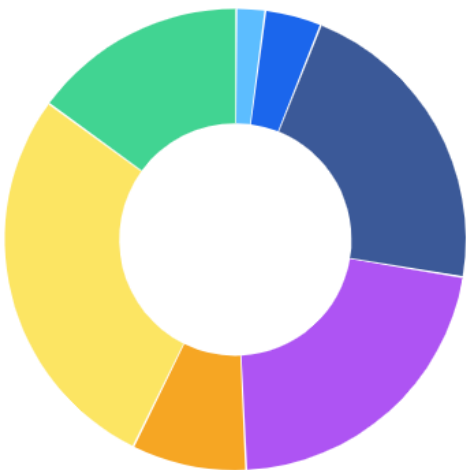
	Population
16+ Civilian Non-Institutionalized Population ?	169,068
Not in Labor Force (16+) ?	68,995
Labor Force ?	100,073
Employed ?	95,999
Unemployed ?	4,074
Under 16, Military, and institutionalized Population	42,053

Source: Lightcast

Educational Attainment

Comal County, June 2025

Concerning educational attainment, 27.7% of Comal County, TX residents possess a Bachelor's Degree (6.2% above the national average), and 8.0% hold an Associate's Degree (0.8% below the national average).

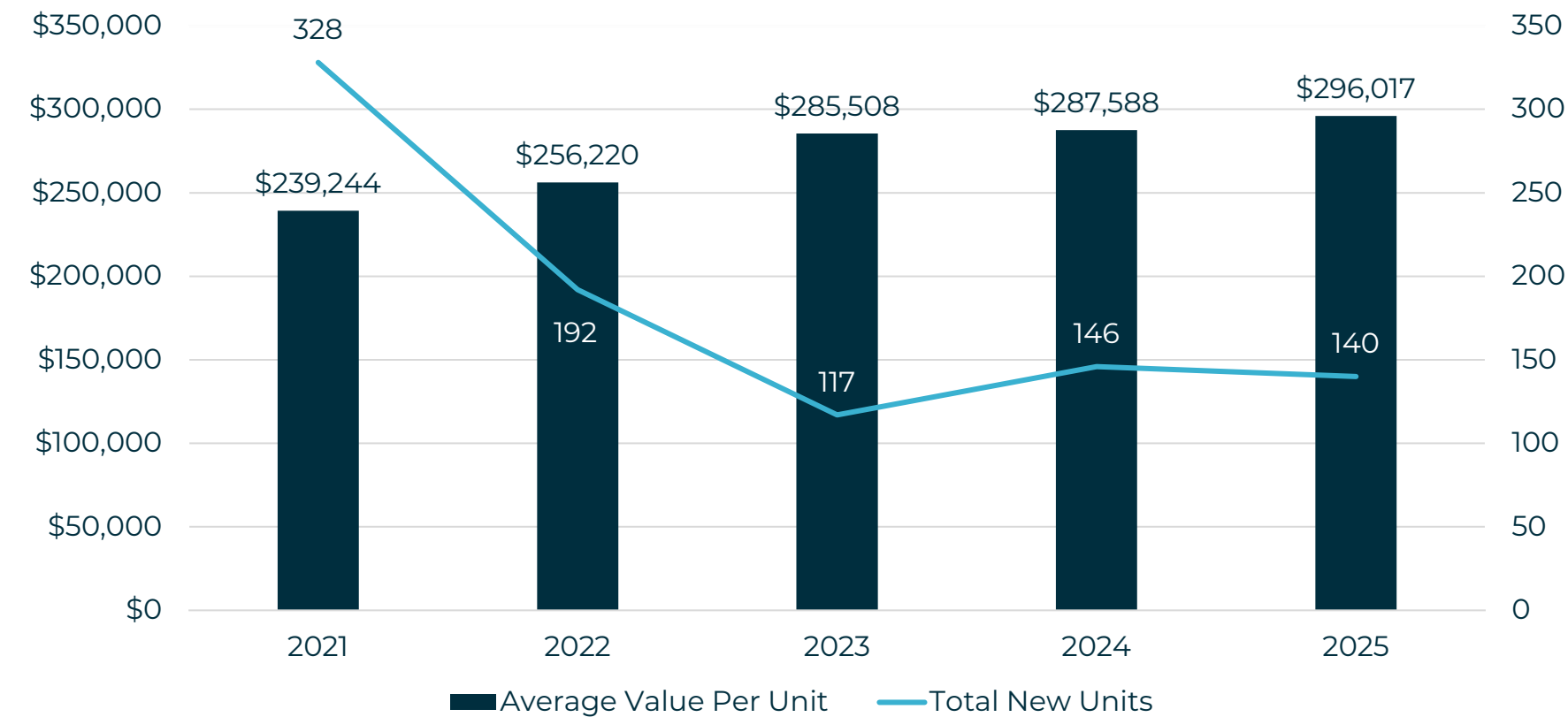


	% of Population	Population
● Less Than 9th Grade	2.0%	2,875
● 9th Grade to 12th Grade	4.0%	5,650
● High School Diploma	21.6%	30,772
● Some College	21.6%	30,866
● Associate's Degree	8.0%	11,471
● Bachelor's Degree	27.7%	39,581
● Graduate Degree and Higher	15.0%	21,456

Source: Lightcast

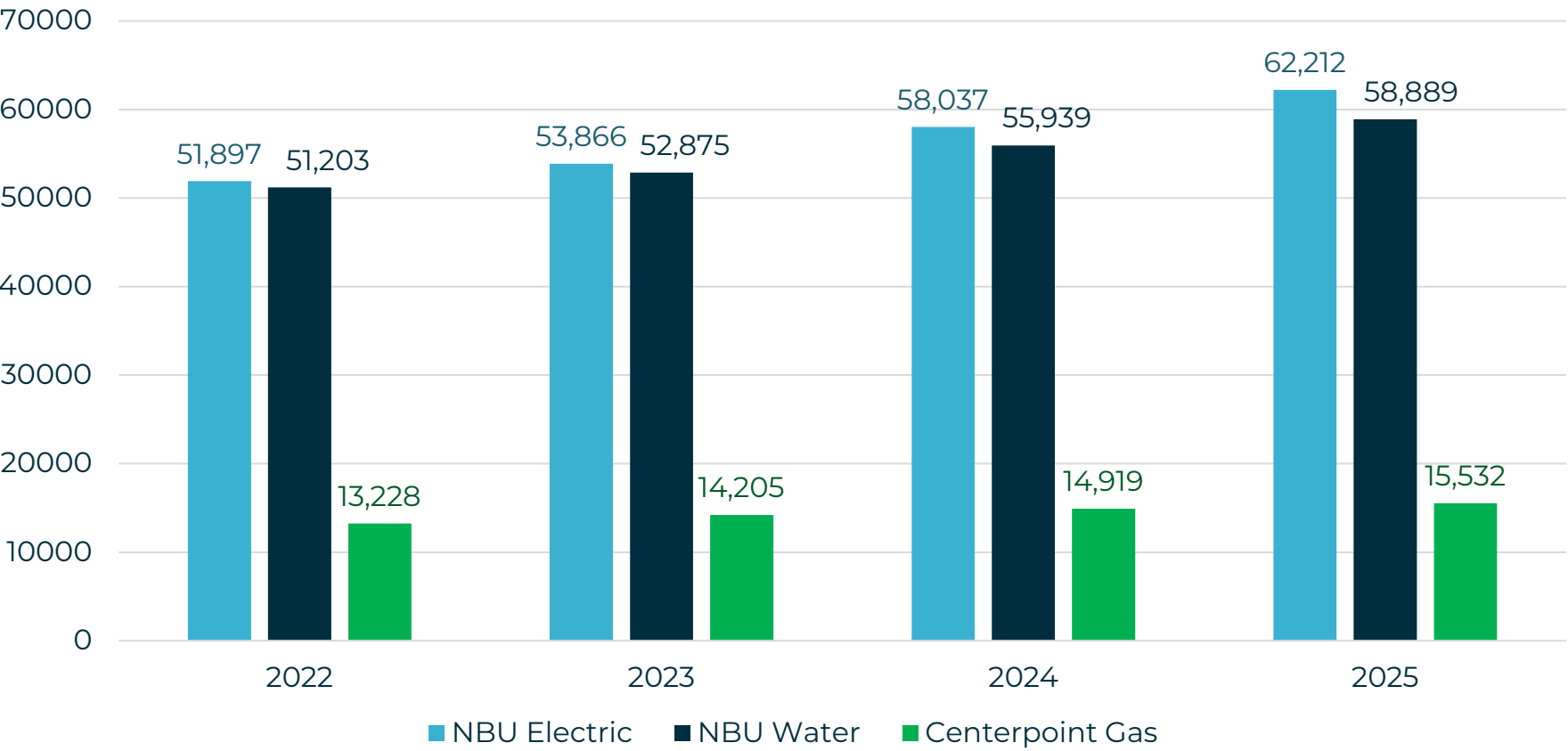
Comal County Septic Permits

August 2021 – August 2025



Utilities Customers

May 2022 – May 2025



Source: NBU and Centerpoint Energy