

Advisory Team Briefing

4th Quarter 2025

Q4 2025 Advisory Report

Pipeline Report

Advisory Team Briefing | 4th Quarter 2025

New Leads by Industry

Q4 2025 | 1 OCT – 31 DEC



Q4 2025

- 21 leads for Q4
- 86% of leads – manufacturing
- Working with 5 new active projects, all in manufacturing

■ Manufacturing ■ Tech ■ Aviation ■ Logistics

Lead Disqualification

Q4 2025 | 1 OCT – 31 DEC

- Large power requirements
- Lots of projects seeking greenfield megasites (over 300 acres)
- Projects require deepwater port access and/or complex logistical requirements

Reason Disqualified	
Reason	Number of DQ factors
Real Estate	20
Logistics	5
Rail	6
High utility use	8
Strategic fit	2
Other	2

Project Disqualifications (based on real estate solution)	
Existing Buildings	Land
575,000 SF existing building with 28 MW existing power	150 acre greenfield with deepwater port siding
80,000 SF existing building with heavy air CO2 permit	Vacant land collocated with a rare earth metals mining facility
250,000 SF building that can be donated as corporate relocation incentive	500 acre greenfield with active rail line or rail spur
20,000 SF existing office building within 20 minutes of a commercial airport	5 acre greenfield with 50MW existing power with a pathway to 180+ MW by 2029

Annual EDC Project Recap

In 2024: Over \$11.75M reinvested into the community

Project	Funding	Description
Headwaters at the Comal	\$2,300,000	Final phase of constriction and delivery for Headwaters project.
Gruene 16 Due Dilligence	\$75,000	Due diligence for public land project.
Northeast Lakeview College Phase 1	\$1,200,000	Grant funding for NLC NB campus relocation and expansion.
HD Supply Performance Agreement	% over duration	Review of existing corporate job creation performance agreement.
Dry Comal Creek Floodplain Remap	\$240,000	Funding engineering and study for floodplain mapping projects.
Northeast Lakeview College Phase 2	\$3,800,000	Funding for final single-phased approach to unlock faster expansion for NLC at new 60K SF campus.
Lefko USA Performance Agreement	\$950,000	Performance agreement for high-wage job creation and U.S. headquarters construction for Lefko USA.
Continental Fee Waivers	\$300,000	Fee wavers for 100+ job expansion of existing Continental autonomous mobility facility.
Annual Contract with City of NB	\$455,386	Annual professional services contract renewal.
Annual SPARK Contract	\$250,000	Annual contract with SPARK small business development center.
Downtown Utility Infrastructure Grant	\$2,200,000	Funding public infrastructure projects such as underground utilities and street parking for catalytic downtown redevelopment project.

Business Retention and Expansion (BRE)

Q4 2025 – Meetings and Services Provided

17 BRE Visits

(75 year end)

- US Aviation
- Green Guys Recycling
- Faust Hotel
- Pakmule
- Seagull PME
- 3C Industrial
- Answerbase
- and several new start-up companies.

Assistance/Services Provided

- 5 Workforce
- 6 Data/Resources
- 12 Professional connections

Business Retention and Expansion (BRE)

Q4 2025 – Workforce Activity

Milestones

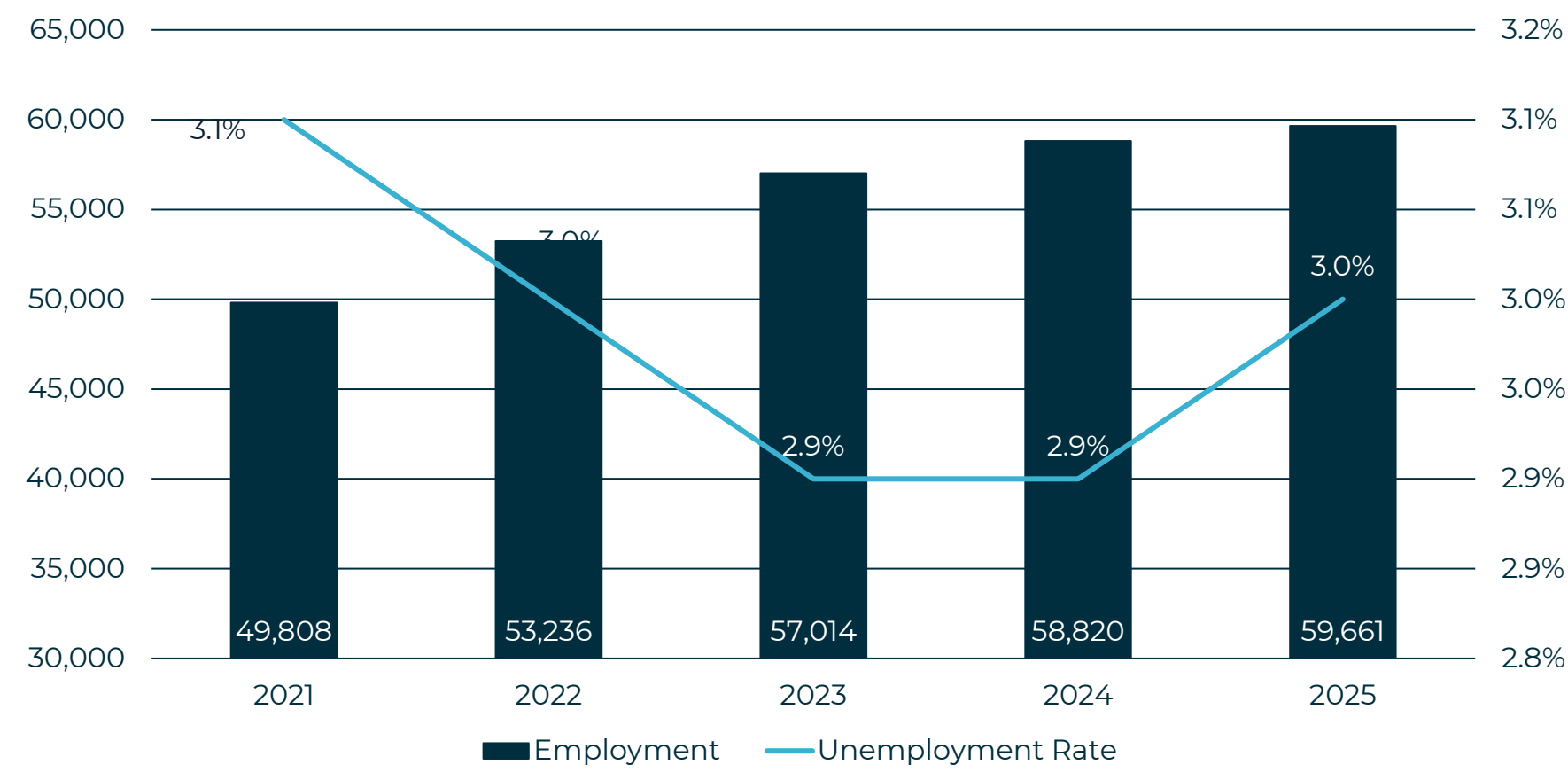
- The 2nd Annual Youth CareerQuest event was held, engaging more than 1,000 local eighth-grade students with over 50 employers and higher education providers through hands-on demonstrations and interactive experiences designed to introduce students to a wide range of future career opportunities.
- The team met with 17 local companies for Business, Retention, and Expansion visits to include US Aviation, Green Guys Recycling, Faust Hotel, Pakmule, and several new start-up companies.
- Key insights from local company visits indicate that tariff exposure continues to be a significant concern for manufacturers, and multiple firms highlighted the need for stronger start-up ecosystem support.
- The Early Child Care Task Force convened and approved the Early Matters New Braunfels program concept and Director position description, and initiated development of a funding request to support the program's launch.
- Hosted Regional Job Fair with 32 employers, and 246 job seekers. 68% of job seekers were from 78130 and 78232.

Economic Indicators

Advisory Team Briefing | 4th Quarter 2025

New Braunfels Employment

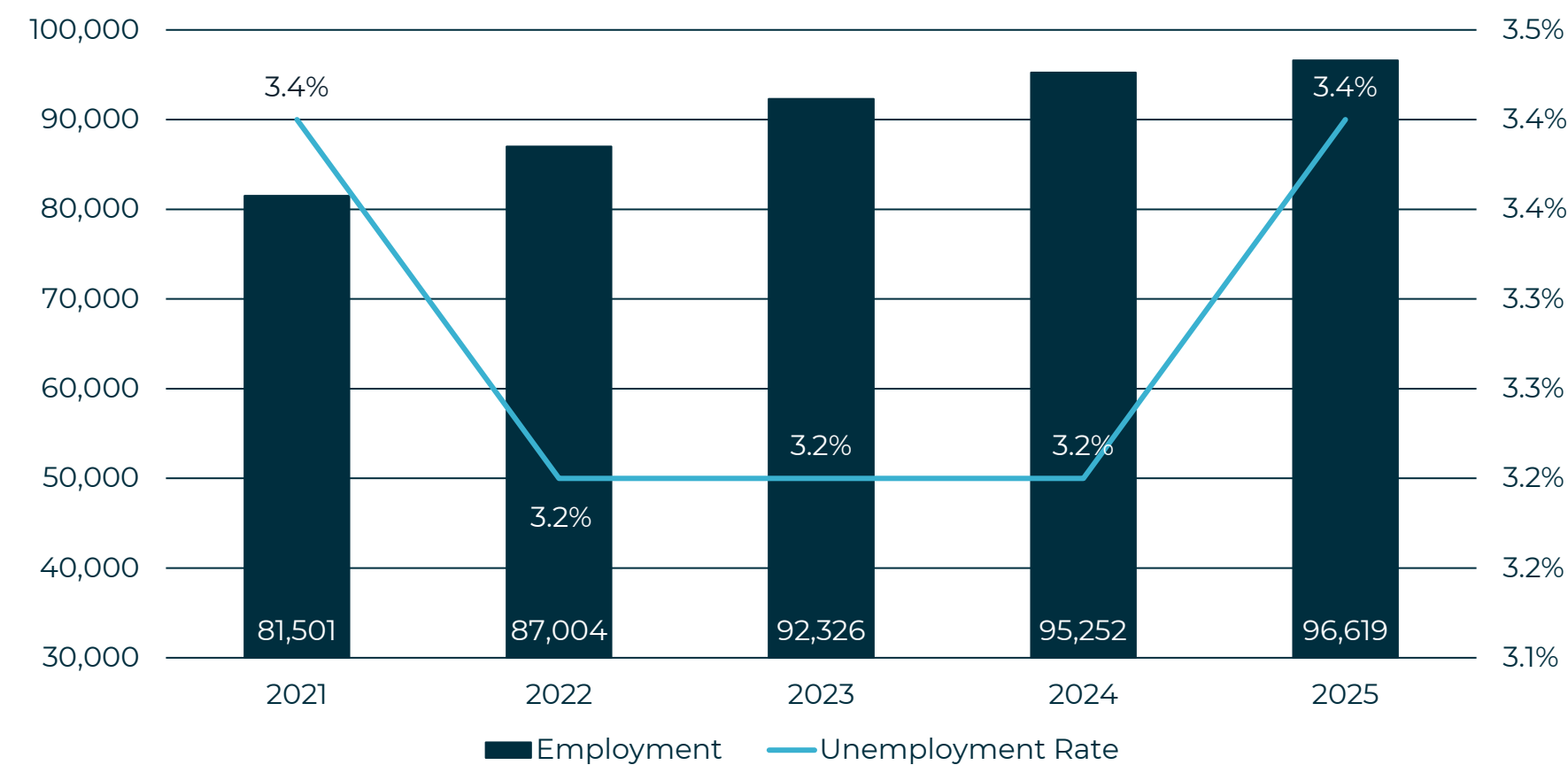
December 2021 - 2025



Source: Texas LMI LAUS

Comal County Employment

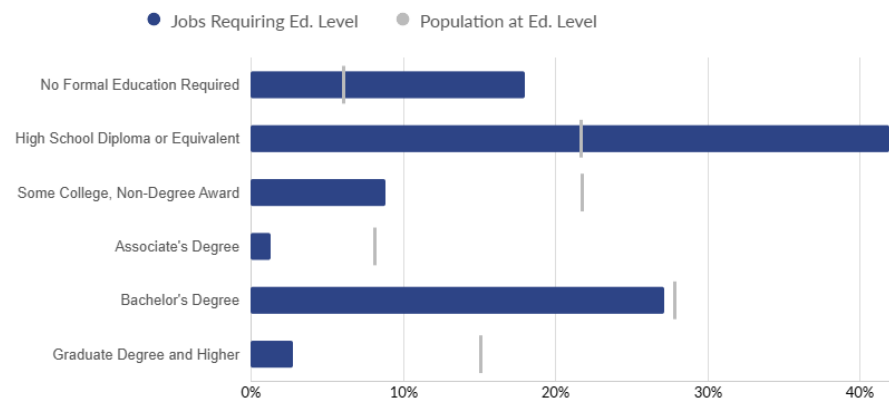
December 2021 - 2025



Source: Texas LMI LAUS

Underemployment

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

4,680

Unique Postings ?

9,991 Total Postings

1,165

Companies Posting ?

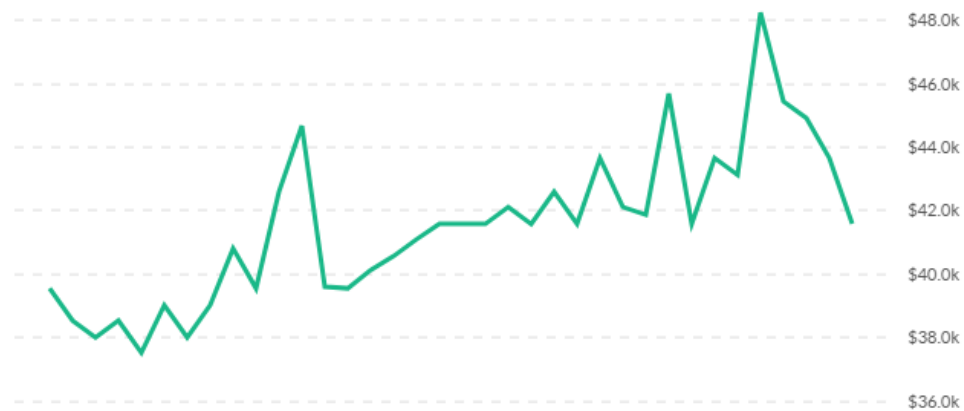
1,165 Total Companies

18 Days

Median Posting Duration ?

2 : 1

Posting Intensity 🇺🇸



Source: Lightcast

Top Posted Occupations

Occupation (SOC)	Total/Unique (Oct 2025 - Dec 2025)	Posting Intensity	Median Posting Duration
 Registered Nurses	1,635 / 633	3 : 1 	17 days
 Retail Salespersons	318 / 140	2 : 1 	19 days
 Home Health and Personal Care Aides	334 / 119	3 : 1 	32 days
 Heavy and Tractor-Trailer Truck Drivers	165 / 91	2 : 1 	17 days
 Customer Service Representatives	267 / 82	3 : 1 	18 days
 First-Line Supervisors of Retail Sales Workers	125 / 72	2 : 1 	15 days
 Radiologic Technologists and Technicians	173 / 66	3 : 1 	15 days
 Food Service Managers	143 / 63	2 : 1 	20 days
 Maintenance and Repair Workers, General	119 / 61	2 : 1 	18 days
 Medical and Health Services Managers	129 / 58	2 : 1 	18 days

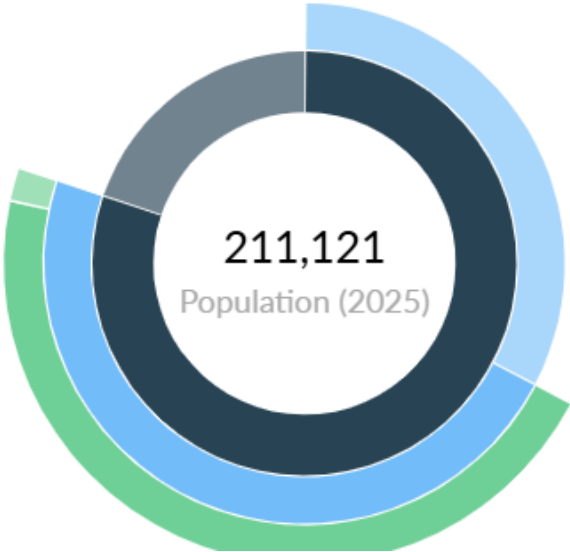
Source: Lightcast

Labor Force Breakdown

Comal County, September 2025

Sep 2025 Labor Force Breakdown

...



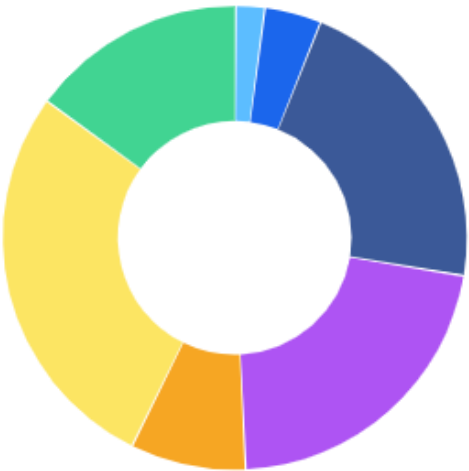
	Population
16+ Civilian Non-Institutionalized Population ?	169,068
Not in Labor Force (16+) ?	68,877
Labor Force ?	100,191
Employed ?	96,365
Unemployed ?	3,826
Under 16, Military, and institutionalized Population	42,053

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

Source: Lightcast

Comal County Septic Permits

October 2021 – October 2025

