

ONE REGION, TWO COUNTIES, FIVE COMMUNITIES

Austin >

Houston >

San Antonio >

PRESENTED BY

**BUDA | KYLE | SAN MARCOS
LOCKHART | LULING | HCEDP**

HAYS (CALDWELL) COMMERCIAL REAL ESTATE MEET UP
SEPTEMBER 8, 2026

SPEAKERS



Jennifer L. Storm | Buda EDC

Jennifer Storm is CEO of the Buda EDC, leading initiatives in business recruitment, entrepreneurship, workforce development and strategic investment. She was named IEDC's 2025 Economic Developer of the Year, becoming the first Texan to receive the honor.

 [@jennifer-storm-btx](#)

Victoria Vargas, CTED | City of Kyle

Victoria Vargas serves as Director of Economic Development for the City of Kyle, where she leads business attraction, redevelopment initiatives and economic development projects supporting one of Central Texas' fastest-growing communities.



 [@victoria-vargas-4130b715](#)

SPEAKERS



Helen Ramirez, AICP | City of San Marcos

Helen Ramirez is San Marcos' Director of Economic & Local Business Development, leading business recruitment, retention, workforce partnerships and strategic growth. An AICP-certified planner, she brings extensive experience in planning, economic development and municipal leadership.

 [@ramirez-helen](#)

Holly Malish, CECD | Lockhart EDC

Holly Malish is Executive Director of the Lockhart EDC and a Certified Economic Developer with nearly two decades of experience helping communities attract investment, create jobs and position themselves for strategic growth.



 [@hollycovingtonmalish](#)

SPEAKERS



Ari Arias | Luling EDC

Ari Arias is the Executive Director for the Luling EDC and leads economic development efforts in Luling, focusing on business attraction, retention and expansion while working closely with local businesses, investors and community partners to support sustainable growth.

 [@ari-arias-ledc](#)

Mike Kamerlander, CECD | Hays Caldwell EDP

Mike Kamerlander is President and CEO of the Hays Caldwell Economic Development Partnership, leading regional business recruitment and investment efforts across Hays and Caldwell counties and helping position the region within the growing Austin–San Antonio Innovation Corridor.



 [@mikekamerlander](#)

FIVE COMMUNITIES. ONE REGIONAL OPPORTUNITY



Diversified Economy

Advanced manufacturing, aerospace/defense, innovative tech, retail/tourism, create a resilient, balanced regional economy



Strategic Location

Between Austin & San Antonio, with I-35, SH 130 & I-10 access — a deep workforce within 60 minutes



Regional Collaboration

Five unique communities offering companies choice, workers opportunity, and communities long-term resilience

If your project needs strategic location, skilled workforce & diverse development options — come talk to us.

HAYS COUNTY

- 304K Population
- +26% Since 2020
- \$89K HH Income
- \$6.3B Retail Sales
- 4,595 Housing Permits



What Makes Hays Different

- combination of Austin–San Antonio access, fast-growing workforce, strong higher education and innovation ecosystem anchored by Texas State University
- Companies also benefit from major transportation connections, diverse site options, and direct access to regional workforce and training partners.

One Big Recent Win



H-E-B | Buda: A major redevelopment will transform a former landfill into a new I-35 retail hub, demonstrating Hays County's ability to solve complex site challenges and enable private investment through regional collaboration.

One Thing to Watch

Infrastructure expansion and site readiness as water, roadway and utility investments continue to catch up with Hays County's rapid growth.

CALDWELL COUNTY

- 54K Population
- \$70K HH Income
- 40k Houses platted



What Makes Caldwell Different

- Available, cost-competitive land Direct access to SH 130 and I-10 connectivity
- Easy access to Austin, San Antonio and Houston
- Offering room to scale in a rapidly emerging industrial market.

One Big Recent Win



- \$51 million in new investment
- Average salaries approx \$130,000
- Reinforce emergence as a destination for innovative, high-value industry.

One Thing to Watch

SH 130 Growth Corridor: Caldwell County's SH 130 corridor is emerging as a major technology and industrial growth node, including the planned 3,000-acre Caldwell Valley Technology Park, which is expected to drive significant new power, utility and infrastructure investment.

REGIONAL LOCATION OVERVIEW

Strategically positioned between Austin and San Antonio — five communities connected by major corridors

Key Location Assets

I-35 · SH 130 · I-10 Corridors

- Buda, Kyle, San Marcos, Lockhart, and Luling
- Strategically positioned between the Austin and San Antonio metros,
- Provides businesses with access to two of Texas’ largest and fastest-growing markets.
- Proximity to both Austin-Bergstrom and San Antonio International airports
- Strengthens regional, national, and global connectivity.
- International connectivity



REGIONAL INFRASTRUCTURE



Electric & Natural Gas

- Multiple established electric/gas utility partners (Pedernales/Bluebonnet Coop & Texas Gas)
- Extensive transmission, distribution, and substation infrastructure
- Site-specific capacity analysis available for high-load users
- Established natural-gas infrastructure throughout key portions of the corridor.



Water & Wastewater

- GBRA + Alliance Water — Long-term regional water infrastructure connecting the Carrizo-Wilcox Aquifer
- Major regional investment underway to diversify and expand long-term water supply for the Austin–San Antonio corridor.
- Regional approach to water and wastewater infrastructure allows communities to plan beyond individual municipal boundaries.



Broadband & Fiber

- Multiple telecommunications companies provide business-class broadband & fiber infrastructure.
- Gigabit-level service is available in portions of the region.
- Growing fiber backbone along major employment and development corridors.
- Coordinate dedicated fiber, redundant routes, and enterprise connectivity for major projects.



Entitlements & Permitting

- Business Friendly Climate
- Regional EDO coordination, pre-development support, utility coordination and expedited permitting opportunities.
- Local economic development teams can help troubleshoot infrastructure and entitlement issues throughout the development process. ***We help projects get to yes.***

REGIONAL EDUCATIONAL ASSETS & INNOVATION ECOSYSTEM



- On Track for Carnegie R1 Status
- \$183M+ in Annual Research Expenditures
- Industry Partnerships & Workforce Talent Pipeline
- Record Enrollment of 47,500+ students for Fall 2026 (92% from Texas)

STAR Park houses STAR One, Texas State's first technology incubator, supporting companies in areas such as biotechnology, chemistry and materials science.

- 58-Acre Research & Commercialization Hub in the Texas Innovation Corridor
- 36,000 SF of Specialized Wet Labs, R&D Facilities & Flexible Space for Technology Companies
- Direct Access to Texas State Research, Talent & Industry Collaboration
- Star Two \$41M Expansion slated Q1 2027 new 74,614 GSF accommodate space for the Division of Research, Transitional Health Research Center, Texas School Safety Center, and Clinical Psychology.
- 9 companies, Biosciences, Aerospace, Drone, AI, Engineering Materials,



REGIONAL EDUCATIONAL ASSETS & INNOVATION ECOSYSTEM



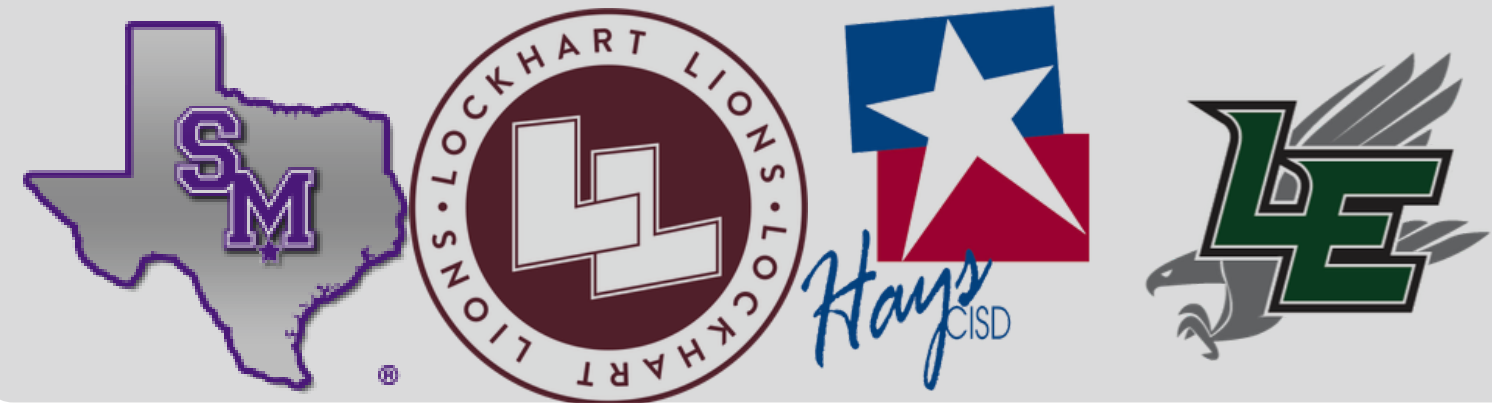
- San Marcos-Based Defense Technology Accelerator
- Powered by Starburst's Global Network
- Connects Companies to Testing, Customers, Capital & Commercialization Resources



- Industry-Certified, Employer-Driven Workforce Training
- Training Locations Serving Hays & Caldwell Counties
- Customized Training & Workforce Development Funding



- Hands-On Technical Training in High-Demand Skilled Trades
- Performance-Based Training Model Aligned with Employer Workforce Needs
- Regional Training Access in Seguin & New Braunfels



- Career & Technical Education Pathways Across Hays, Lockhart, Luling & San Marcos ISDs
- Industry Certifications, Dual Credit & Hands-On Skills Training
- Employer-Aligned Programs Building the Region's Future Workforce

HAYS-CALDWELL COUNTIES WORKFORCE

The region is positioned within one of Central Texas' fastest-growing labor markets, supported by Texas State University, Austin Community College, Gary Job Corps and Workforce Solutions Rural Capital Area, connecting employers to university graduates, skilled trades, technical training and workforce development resources.

2.7M+

Workers accessible within a 60-minute drive,

- Regional labor force - 196K
- 20% population increase since 2020

43%

Of Hays County adults 25+ hold a bachelor's degree or higher

- 1,600+ Training Capacity at Gary Job Corp.
- **Skilled Trades + Technical Training**
- Welding • Electrical • Manufacturing • HVAC • Healthcare • Logistics

140K+

TXST alumni in Central Texas

- 8,600+ degrees awarded in 24-25

Talent pipelines in engineering, manufacturing, computer science, data science, business and life sciences

INDUSTRY CLUSTERS SNAPSHOT

REGIONAL INDUSTRY CLUSTERS

A STRONGER REGION. A BRIGHTER FUTURE.

INDUSTRY / OPPORTUNITY	BUDA	KYLE	SAN MARCOS	LOCKHART	LULING
 Advanced Manufacturing High-tech. Precision. Growth.	●	●	●	●	●
 Technology / Innovation Ideas. Talent. Opportunity.	●	●	●	●	●
 Retail / Hospitality / Destination Unique Places. Lasting Impressions.	●	●	●	●	●
 Aerospace / Aviation Built for What's Next.	◐	◐	●	◐	●
 Healthcare / Life Sciences Healthy People. Brighter Tomorrows.	●	●	◐	◐	◐
 Professional / Knowledge-Based Services People. Expertise. Progress.	●	●	●	◐	◐
 Food / Agribusiness From Our Region to the World.	◐	◐	◐	●	●
 Logistics / Distribution Connected. Efficient. Scalable.	—	●	●	●	●

 Strong Presence
  Emerging / Growing
  Limited Presence

FIVE COMMUNITIES.
ONE OPPORTUNITY.

3 clusters

- Advanced Manufacturing
 - Technology/Innovation
 - Retail/Hospitality
- Shared strengths across all 5 communities.

Emerging

AEROSPACE TECHNOLOGY CORRIDOR

X-Bow • CFAN • Collins Aerospace • Berry Aviation
Redbird Flight Simulations • Perseus Defense •
Even Platforms • Caldwell Manufacturing
• Method Manufacturing

Resilient

Cluster diversity across communities strengthens the region's economic resilience and competitive advantage.

BUDA

- **Austin Access Without Austin Friction** — Located on I-35 less than 20 minutes south of DT Austin
- immediate access to the Austin metro, workforce, and innovation ecosystem
- smaller, more responsive business environment
- **Educated, Growing Talent Base** — More than 45% of Buda residents ages 25–64 hold a bachelor's degree or higher
- Approximately 3 million square feet of Class A industrial speculative space is available or under construction

What Makes Buda Different

- Buda offers small-town identity and community character with immediate proximity to Austin's metro economy and workforce.
- Permit Navigator Position

ONE Recent Win



Even Platforms

SUNSCOUT
Crewline

ONE Thing to Watch

The Depot On Main is revitalized 1880's historic train depot reimagined as a launchpad for local makers, retail startups, and collaborative commerce. Q1 2027 Grand Opening



THE DEPOT
— ON MAIN —

BUDA
Economic Development Corporation

KYLE

\$838.8M 5-Year CIP

- Investing in infrastructure to support continued growth and development
- Major water and wastewater infrastructure upgrades to expand capacity for current and future development
- Growing Advanced Manufacturing & FDI Base anchored by global employers Simwon, Plastikon and ENF Technology

\$250M Kyle Park

- 101-acre mixed-use lifestyle destination bringing major new retail, dining, entertainment and commercial investment

What Makes Kyle Different

Scale of Growth + Room to Build

- Rapid population and commercial growth combined with significant remaining development capacity
- With only about 40% of Kyle developed, significant opportunity remains for future commercial and employment growth

ONE Thing to Watch

Kyle Commerce Center

- 328,000+ SF of new Class A industrial space underway on 28 acres.
- Four-building project- flexible suites for small and mid-sized industrial users, expanding Kyle's inventory of modern employment space and supporting continued manufacturing and business growth.

ONE Big Recent Win

Kyle's healthcare ecosystem is expanding

- St. David's HealthCare has begun construction on a \$20.5 million, 13,000-SF emergency center, the first phase of its proposed hospital
- Austin Community College is expanding with a health sciences and nursing facilities
- Strengthening the pipeline of healthcare professionals needed to support the region's continued growth
- Joining existing Ascension Seton Hays, already serving as a regional hospital and the only Level II Trauma Center in Hays County.

SAN MARCOS

Talent and Innovation Anchor

What Makes San Marcos Different

- San Marcos Regional Airport home to 17 aviation business, including multiple flight schools, FBO, Bristow Group and is the reliever airport to AUS and SA International Airports
- Future expansion plans include cargo and passenger air service.
- TXST places San Marcos at the center of the region's workforce pipeline. 10,000 science + engineering students.

ONE Big Recent Win

ONE COHESIVE ECOSYSTEM

Significant business expansions + attraction

- GUGLI, corporate HQ
- USLBM Texas Building Supply
- Balcones South Class A Office/Warehouse
- New 1,300 Riverbridge Ranch PID, \$400M
- Blackbird Brims, custom western hat studio in Downtown
- Ollie's Market new culinary prep & commercial kitchen incubator space

ONE Thing to Watch

Large-scale employment sites, such as a 2,000 acre TriTexas megasite near the San Marcos Regional Airport, are advancing alongside downtown innovation projects that blend entrepreneurship, retail, and mixed-use development. These initiatives position San Marcos as the region's education and innovation powerhouse for the next decade.



WINGS &
WARRIORS
Texas Capital Air Show

NOV 7-8, 2026

SAN
MARCOS
TEXAS



San Marcos is the region's education and innovation powerhouse.



Collins Aerospace
An RTX Business





What Makes Lockhart Different

Direct SH 130 access, abundant available land at competitive costs, and a nationally recognized BBQ and destination identity that draws visitors and businesses alike.



CITY OF
Lockhart
ECONOMIC DEVELOPMENT

Lockhart offers growth opportunities while maintaining strong regional connectivity.

One Big Recent Win

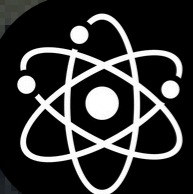
Hill Country Foodworks is expanding into a 62,000 sq ft facility from a 10,000 sq ft facility, launching the company into the next era of co-packing in the cluster-based food and beverage industry

One Thing to Watch

Ample opportunities for redevelopment. The West End Redevelopment was a first of its kind in terms of operational and financial structure and setting the framework for future redevelopment projects in terms of urban revitalization and adaptive reuse.



Wild Bunch
Brewery
RED ROCK • TEXAS



QUANTUM
ENGINEERING



Ascension

What Makes Luling Different

We are the region's gateway to I-10.

At the intersection of I-10, US 183, and SH 80, Luling connects the Austin–San Antonio corridor with Houston, the Gulf Coast, and markets across Texas.

Lower-cost development options make Luling an attractive destination for cost-conscious businesses and industrial users.

One Big Recent Win

X-Bow's Luling campus is moving into production, backed by approximately \$40M in private capital, the facility is designed to produce 1 million pounds of energetics annually, with plans to triple in 12-24 months.



One Thing to Watch

Emerging industrial and logistics developments, combined with growing aerospace presence, position Luling as a key node expanding the region's reach to statewide and national markets.

WE APPRECIATE YOUR TIME AND LOOK FORWARD TO THE
CONVERSATION.

THANK YOU

For questions, site visits, or further discussion,
please reach out to the community economic
development representatives across
Buda, Kyle, San Marcos, Lockhart, and Luling.

ONE REGION, FIVE COMMUNITIES. TWO COUNTIES.

Q&A

Buda EDC



Jennifer L. Storm

Hays Caldwell EDP



Mike Kamerlander

Lockhart EDC



Holly Malish

City of Kyle



Victoria Vargas

City of
San Marcos



Helen Ramirez

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