

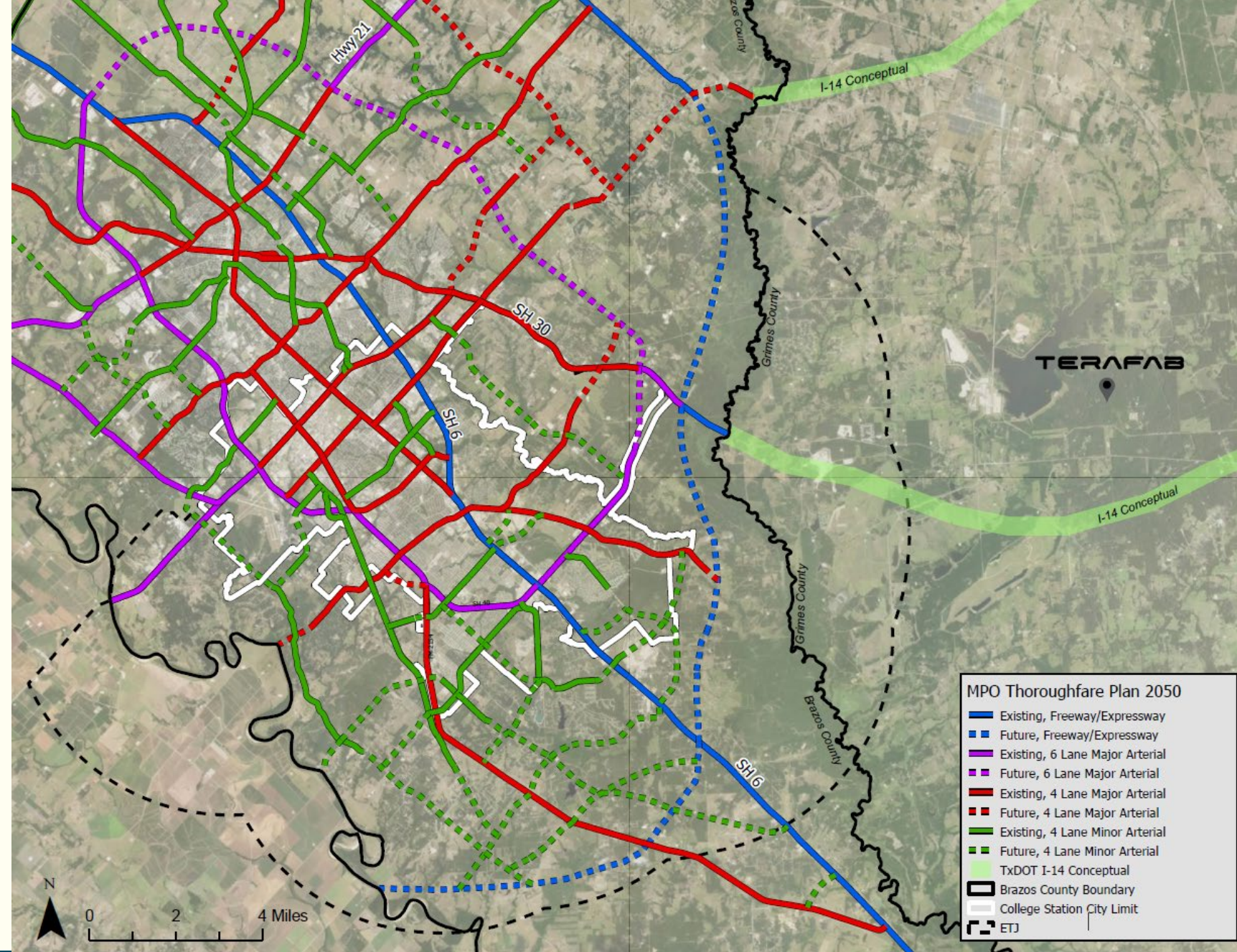
TERAFAB + COLLEGE STATION: PREPARING FOR REGIONAL GROWTH

Assessing growth, development, infrastructure, and housing readiness

September 10, 2026



PROXIMITY



TERAFAB AT A GLANCE

\$16.8+ Billion

Projected investment in the first phase

\$100+ Billion

Total capital investment

\$2 Billion

Cumulative economic impact by 2038

100 Million

Square Feet

Source: Greater Brazos Partnership

TERAFAB AT A GLANCE

1,500 – 1,800*

Projected direct jobs created

4,921

Annual average on-site construction workforce

2,100+

Projected total jobs (indirect and induced)

24 Minute

Drive time from College Station

Source: Greater Brazos Partnership

* Other releases indicate 3,000 jobs

Governor Abbott Announces SpaceX Expansion In Grimes County

August 6, 2026 | Austin, Texas | [Press Release](#)

Governor Greg Abbott today announced SpaceX will construct a vertically integrated semiconductor fabrication plant in Grimes County. The first phase of the Terafab project represents a capital investment of more than \$16.8 billion and **will create 3,000 new jobs**. A Texas Enterprise Fund (TEF) grant of \$30 million has been extended to SpaceX. The facility is also a qualified project under the Texas Jobs, Energy, Technology, and Innovation (JETI) program.

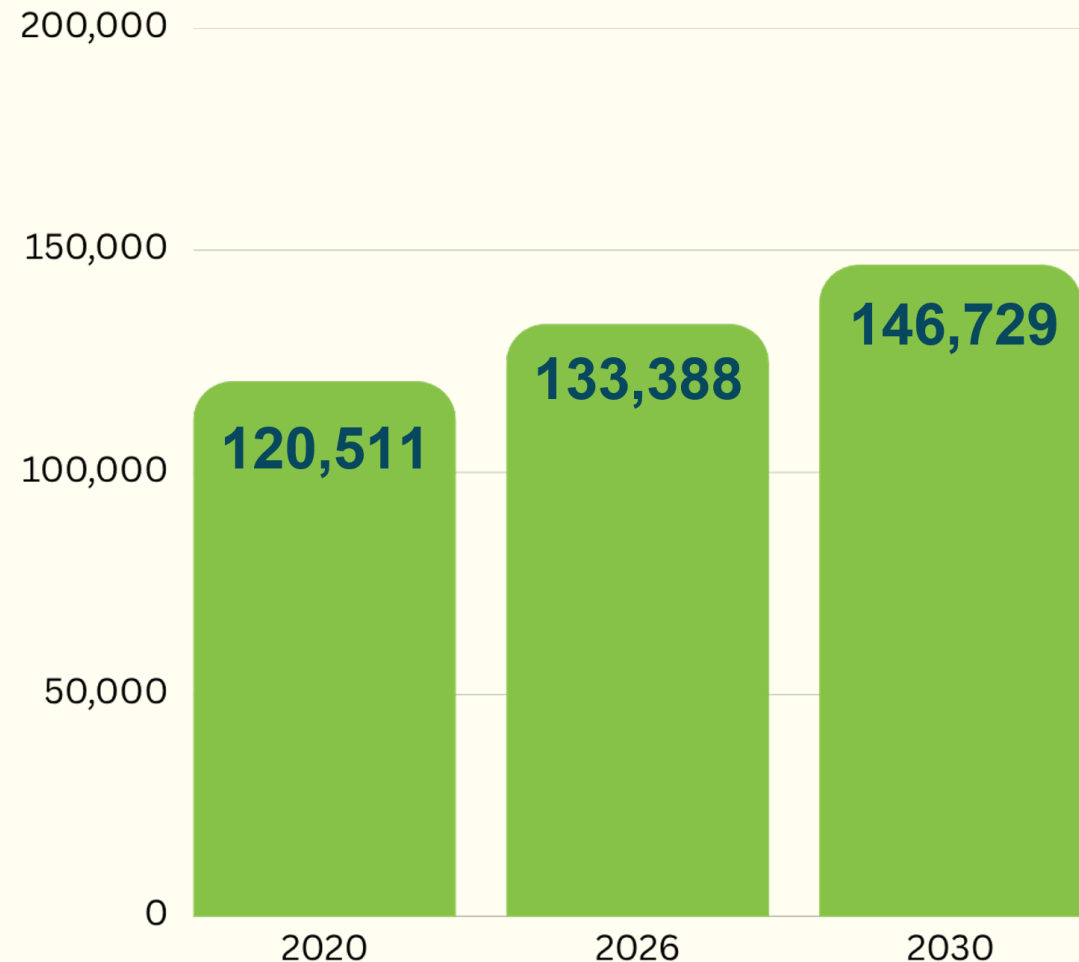
“Texas is where big ideas grow even bigger,” said Governor Abbott. “I congratulate SpaceX on this significant expansion of their investment in our great state. The first-of-its-kind Terafab facility will accelerate chip production in Texas at an unprecedented scale, create thousands of good-paying jobs in Grimes County, and expand economic opportunity for generations of Texans across Southeast Texas and beyond.”

The background features a series of overlapping, tilted squares in two shades of blue. The squares are arranged in a way that creates a sense of depth and movement, with some squares appearing to be in front of others. The overall effect is a modern, geometric pattern.

**TERAFAB IS BEING LAYERED ONTO
AN ALREADY-GROWING REGIONAL
ECONOMY RATHER THAN ENTERING
A STAGNANT MARKET.**

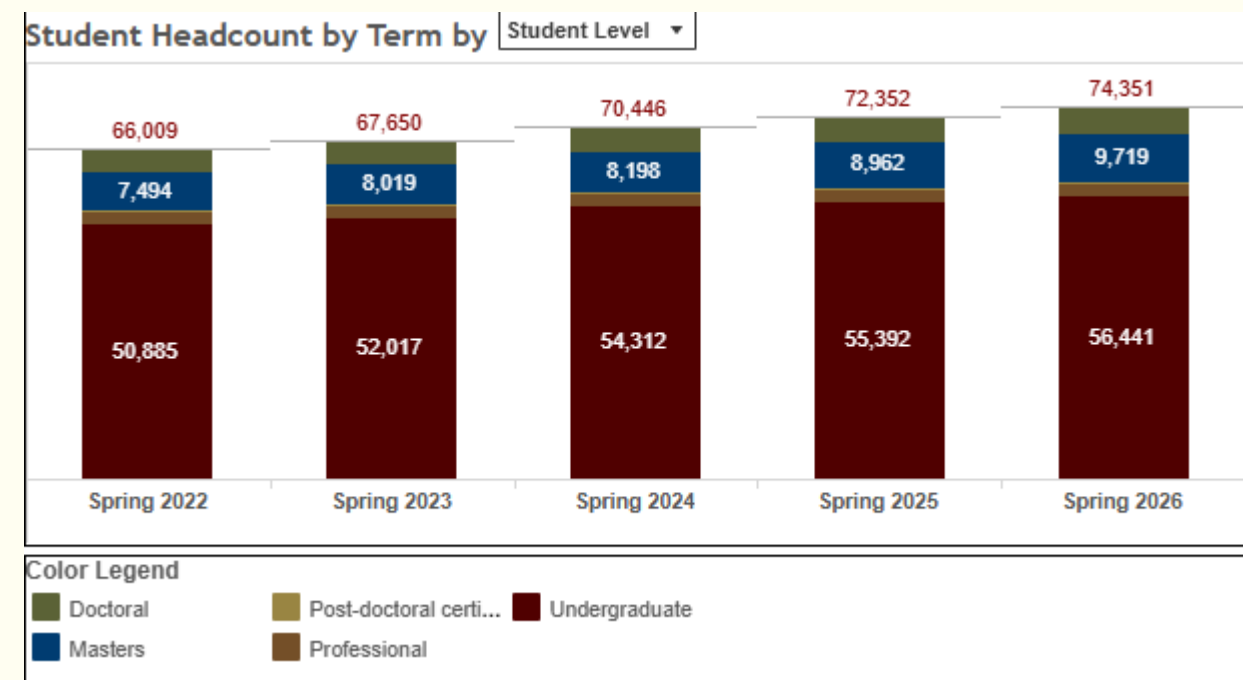
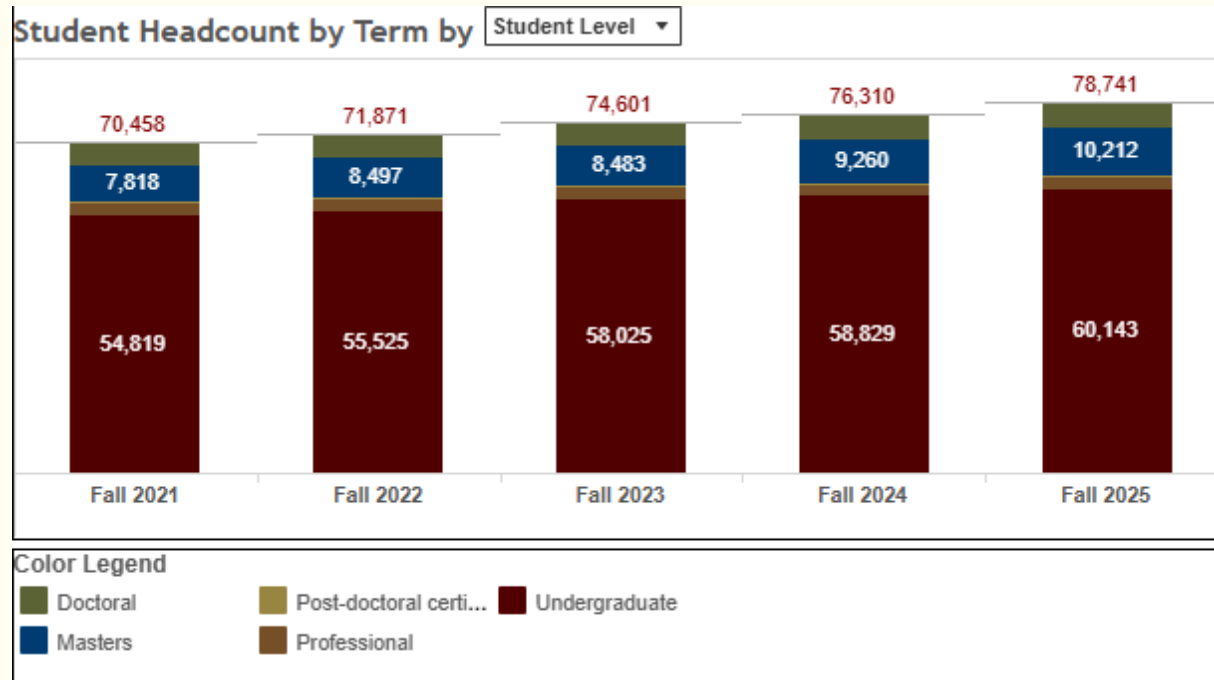
GROWTH WAS ALREADY COMING

- **Population Growth:**
 - 2010 - 2020: 26.19%
 - 2020 - 2030: 21.8%
 - Long Range Planning Assumes 2% Growth Rate



Source: Planning & Development Services

THE TEXAS A&M GROWTH FACTOR



Source: <https://abpa.tamu.edu/data-and-insights/enrollment/enrollment-profile.html>

WHY THIS MATTERS FOR TERAFAFAB

Texas A&M has been a primary driver of College Station's population, housing, transportation and development patterns for decades. Terafab introduces a new source of regional employment and population growth alongside this existing university-driven demand.

- **Housing:** Texas A&M already drives steady housing demand, and Terafab would add short-term construction and long-term employee demand across hotels, rentals, apartments, and traditional housing.
- **Transportation:** Texas A&M already drives major regional travel, and Terafab would add new commuter flows between nearby communities, increasing overall transportation demand.

WHY THIS MATTERS FOR TERAFAFAB

- **Workforce:** Texas A&M's talent and research ecosystem can complement Terafab's long-term semiconductor workforce needs, while construction labor represents a separate short-term demand during the project buildout.
- **Development & Services:** Texas A&M has long shaped College Station's development, and Terafab will further boost demand for housing, services, supplier space, with construction-driven activity creating some of the earliest impacts on lodging, restaurants, retail, and other services.

11-YEAR SUBMARKET GROWTH MATRIX – 1,500 DIRECT JOBS

ZIP	Submarket	County	2026 Base	Organic	Terafab	Total	2037 Projected	11-yr Growth
77845	S. College Station	Brazos	77,079	+11,063	+871	+11,934	89,013	15.48%
77803	N. Bryan	Brazos	31,289	+1,572	+625	+2,197	33,486	7.02%
77802	Central/E. Bryan	Brazos	27,474	+1,925	+554	+2,479	29,953	9.02%
77807	W. Bryan	Brazos	16,143	+6,819	+404	+7,223	23,366	44.74%
77868	Navasota	Grimes	18,615	+2,764	+449	+3,213	21,828	17.26%
77808	E. Bryan	Brazos	16,960	+3,608	+373	+3,981	20,941	23.47%
77801	S. Bryan	Brazos	16,404	+861	+487	+1,348	17,752	8.22%
77830	Anderson	Grimes	3,719	+1,280	+286	+1,566	5,285	42.11%
77831	Bedias	Grimes	3,925	+536	+336	+872	4,797	22.22%
77861	Iola	Grimes	3,141	+370	+277	+647	3,788	20.60%
77873	Richards	Grimes	1,672	+142	+293	+435	2,107	26.02%
TOTAL			216,421	+30,940	+4,955	+35,895	252,316	16.59%

Source: Greater Brazos Partnership

11-YEAR SUBMARKET GROWTH MATRIX – 3,000 DIRECT JOBS

ZIP	Submarket	County	2026 Base	Organic	Terafab	Total	2037 Projected	11-yr Growth
77845	S. College Station	Brazos	77,079	+11,063	+1,705	+12,768	89,847	16.56%
77803	N. Bryan	Brazos	31,289	+1,572	+1,224	+2,796	34,085	8.94%
77802	Central/E. Bryan	Brazos	27,474	+1,925	+1,085	+3,010	30,484	10.96%
77807	W. Bryan	Brazos	16,143	+6,819	+791	+7,610	23,753	47.14%
77868	Navasota	Grimes	18,615	+2,764	+879	+3,643	22,258	19.57%
77808	E. Bryan	Brazos	16,960	+3,608	+730	+4,338	21,298	25.58%
77801	S. Bryan	Brazos	16,404	+861	+954	+1,815	18,219	11.06%
77830	Anderson	Grimes	3,719	+1,280	+560	+1,840	5,559	49.48%
77831	Bedias	Grimes	3,925	+536	+658	+1,194	5,119	30.42%
77861	Iola	Grimes	3,141	+370	+542	+912	4,053	29.04%
77873	Richards	Grimes	1,672	+142	+574	+716	2,388	42.82%
TOTAL			216,421	+30,940	+9,702	+40,642	257,063	18.78%

Note: Assumptions above based on additional direct jobs generated by Terafab.

Source: Greater Brazos Partnership

11-YEAR SUBMARKET GROWTH MATRIX – 6,000 DIRECT JOBS

ZIP	Submarket	County	2026 Base	Organic	Terafab	Total	2037 Projected	11-yr Growth
77845	S. College Station	Brazos	77,079	+11,063	+3,410	+14,473	91,552	18.78%
77803	N. Bryan	Brazos	31,289	+1,572	+2,448	+4,020	35,309	12.85%
77802	Central/E. Bryan	Brazos	27,474	+1,925	+2,170	+4,095	31,569	14.91%
77807	W. Bryan	Brazos	16,143	+6,819	+1,582	+8,401	24,544	52.04%
77868	Navasota	Grimes	18,615	+2,764	+1,758	+4,522	23,137	24.29%
77808	E. Bryan	Brazos	16,960	+3,608	+1,460	+5,068	22,028	29.88%
77801	S. Bryan	Brazos	16,404	+861	+1,908	+2,769	19,173	16.88%
77830	Anderson	Grimes	3,719	+1,280	+1,120	+2,400	6,119	64.53%
77831	Bedias	Grimes	3,925	+536	+1,316	+1,852	5,777	47.18%
77861	Iola	Grimes	3,141	+370	+1,084	+1,454	4,595	46.29%
77873	Richards	Grimes	1,672	+142	+1,149	+1,291	2,963	77.21%
TOTAL			216,421	+30,940	+19,405	+50,345	266,766	23.26%

Note: Assumptions above based on additional direct jobs generated by Terafab.

Source: Greater Brazos Partnership

PERCENT OF PROJECTED POPULATION GROWTH

1500

14%

Projected regional growth is Terafab

86%

Projected regional growth is organic
demography

3000

24%

Projected regional growth is Terafab

76%

Projected regional growth is organic
demography

6000

39%

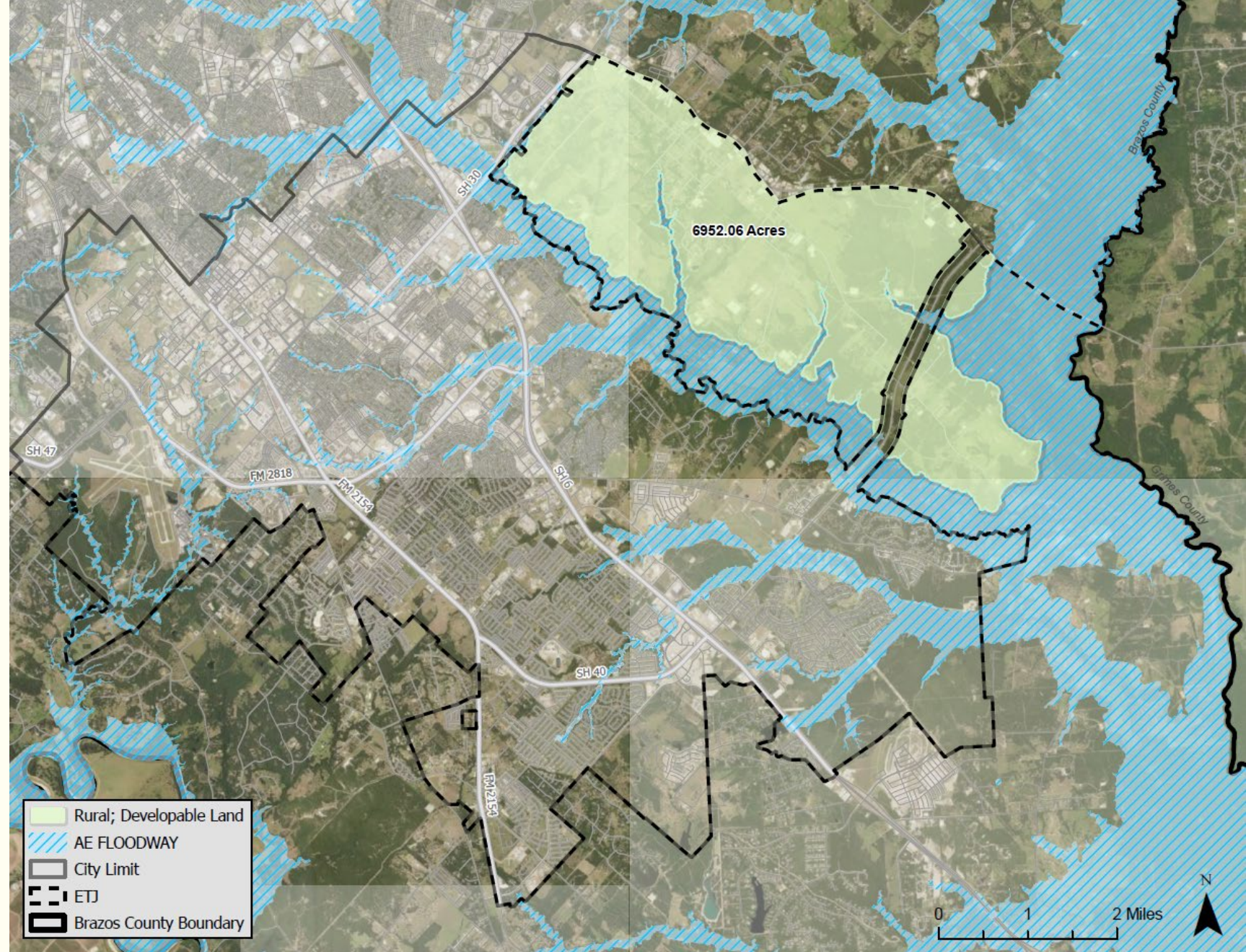
Projected regional growth is Terafab

61%

Projected regional growth is organic
demography

Source: Greater Brazos Partnership, for only the 1500. Assumptions above based on additional direct jobs (3000 and 6000) generated by Terafab.

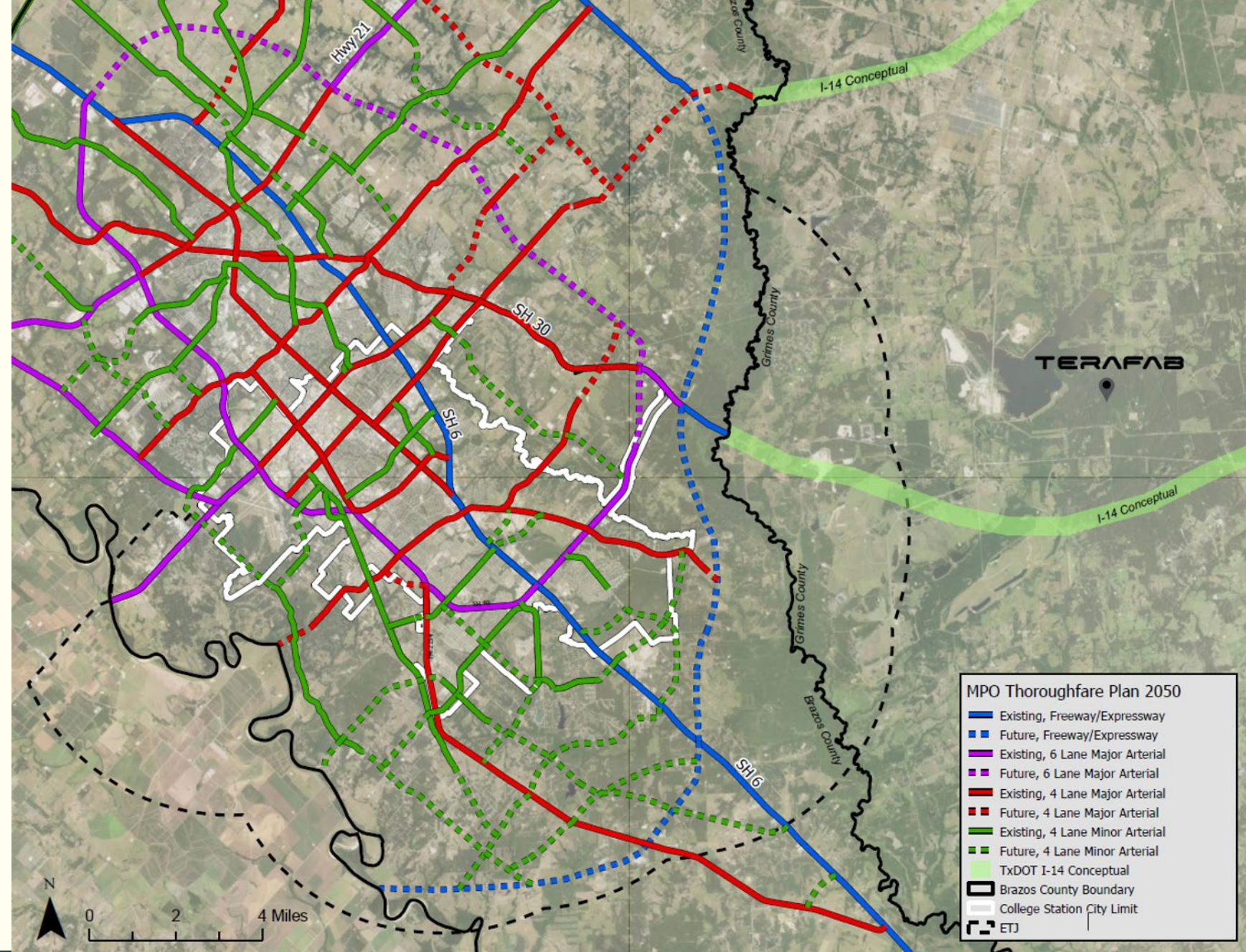
HOW MUCH DEVELOPABLE LAND DO WE ACTUALLY HAVE?



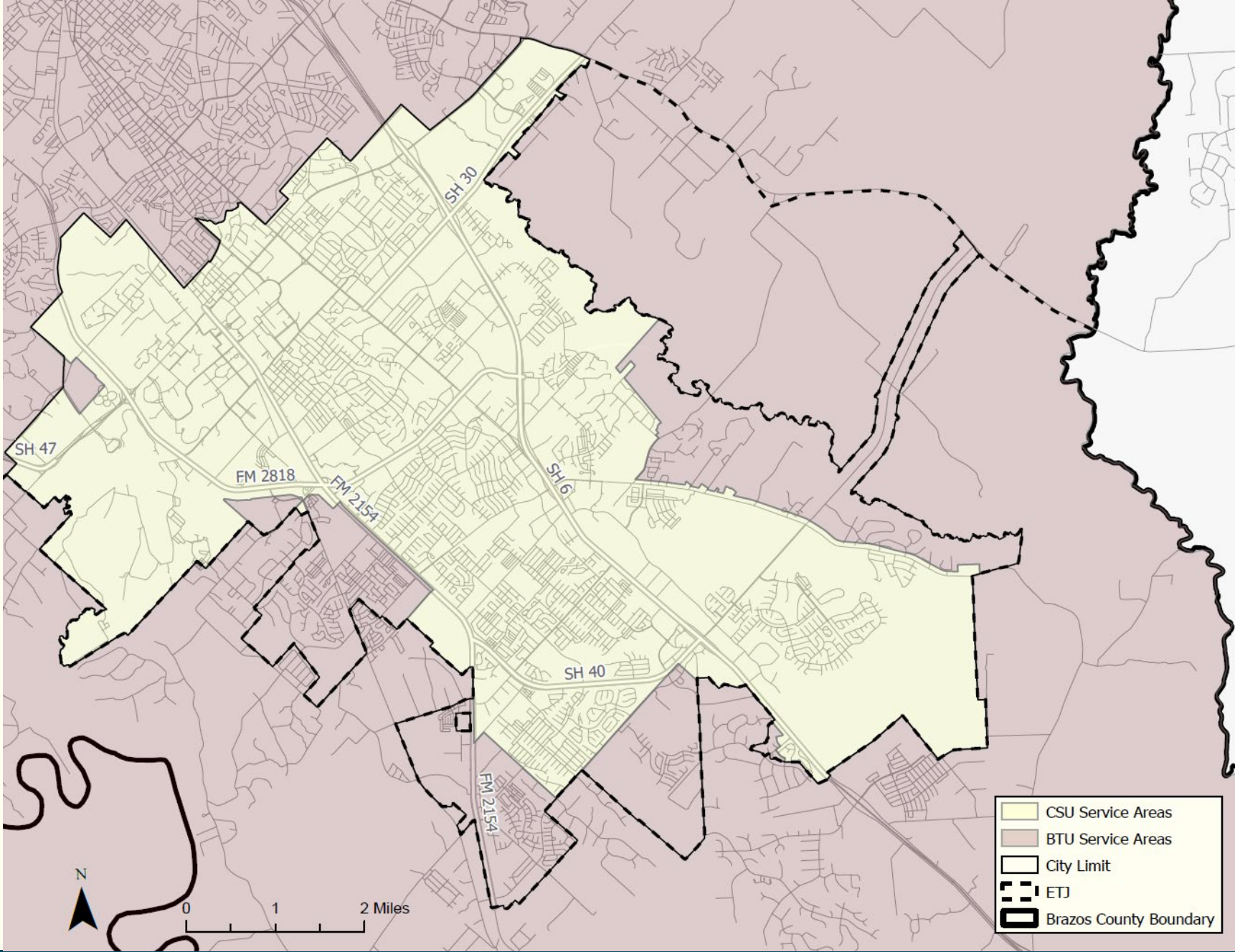
WHERE CAN EMPLOYMENT & COMMERCIAL GROWTH OCCUR?



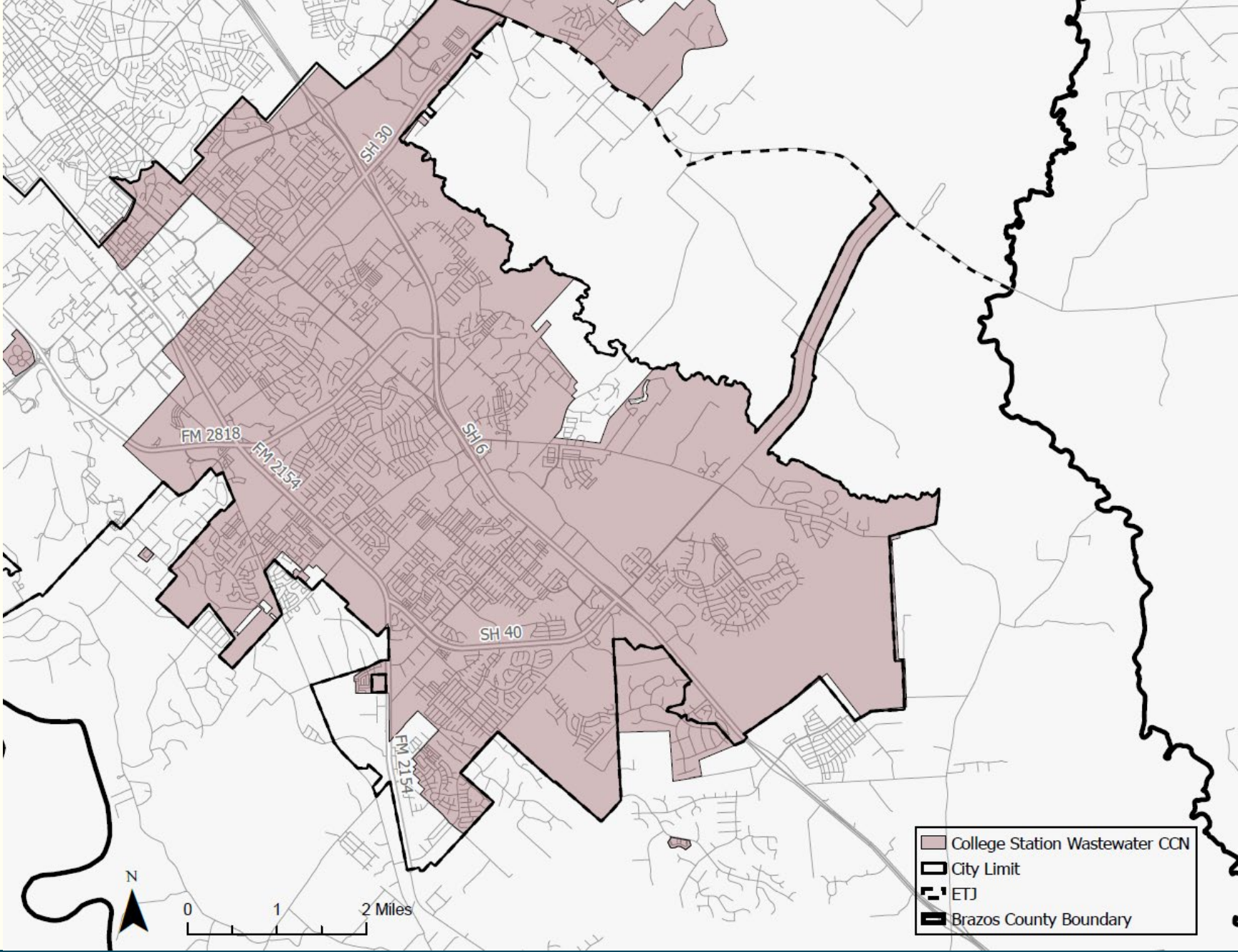
TRANSPORTATION READINESS



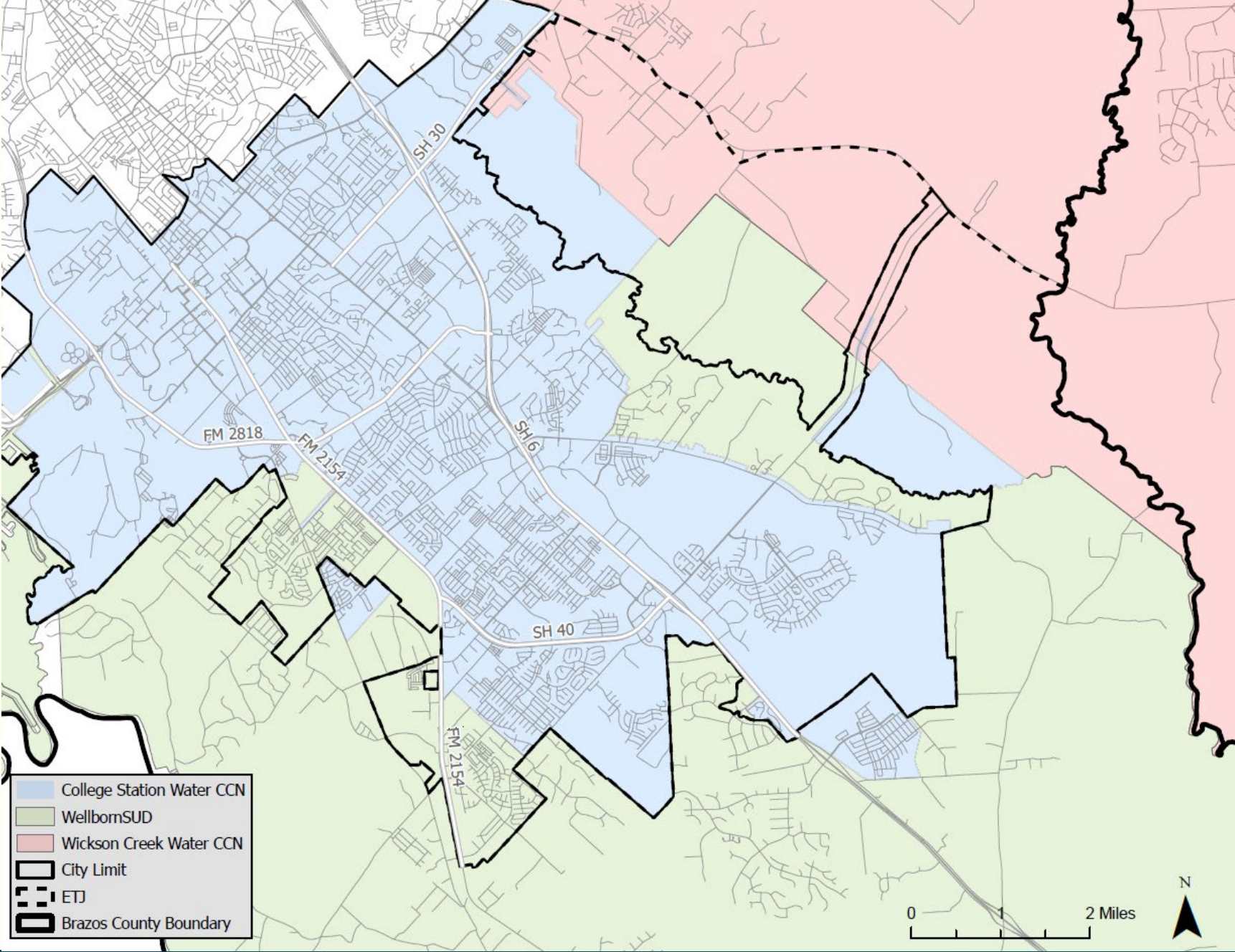
UTILITY SERVICE – CCN ELECTRIC



UTILITY SERVICE – CCN WASTEWATER



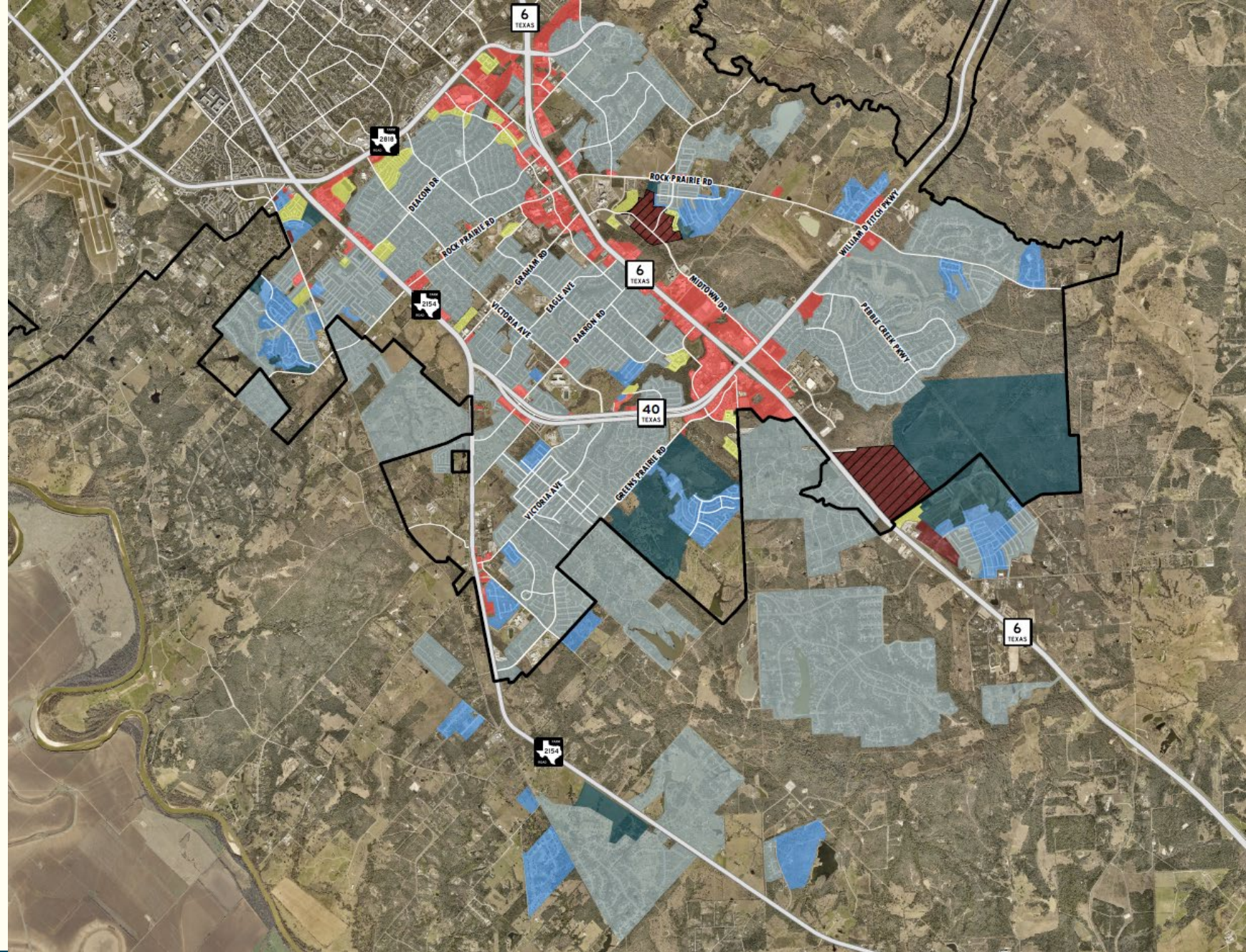
UTILITY SERVICE – CCN WATER



HOUSING PIPELINE

MAPKEY

- Commercial
- Future Commercial
- Future Commercial/Multi-Family
- Multi-Family
- Existing Single Family
- Active Single Family
- Future Single Family



WILL THE HOUSING PIPELINE BE ENOUGH?

ZIP	Submarket	County	2026 Base	Organic	Terafab	Total	2037 Projected	11-yr Growth
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EXISTING & IDENTIFIED SUBDIVISIONS	HOMES	POP/HOME*	POPULATION
Existing Single Family	19,030	2.76	52,523
Active Subdivisions- Under Construction	442	2.76	1,220
Active Subdivisions- Current Lots	1,618	2.76	4,466
Existing Multi-Family	3,612	2.05	7,405
Future Multi-Family	1,477	2.05	3,028
Future Subdivisions	7,057	2.76	19,477

**10,594 Active or Future Homes,
28,191 Population**

LESSONS FROM STARBASE

Brownsville, Texas

PROJECT SCALE COMPARISON

	SpaceX/Starbase – Brownsville 600 acres	Terafab – Grimes County 6,000 acres, 100 million SF
Project Type	Aerospace manufacturing, launch and testing complex	Vertically integrated semiconductor fabrication
Location	Starbase, outside of Brownsville proper	Grimes County, outside of College Station proper
Relationship to City Comparison	Brownsville is nearby but is not the host municipality	College Station is nearby but not the host municipality
Current/Announced Employment	4,200 – 4,300 currently; projected growth toward 8,000	1,500 – 3,000 projected jobs
Economic Scale	\$13B+ reported regional impact over two recent years	\$16.8B+ Phase I capital investment
Primary Local Effects	Housing, workforce, traffic, tourism, services, supplier/technology activity	Expected housing, workforce, commuting, services and supplier opportunities
Development Pattern	Impacts spread well beyond the project site into Brownsville and the broader region	Potential impacts likely to spread across Grimes and Brazos counties
Timeline	More than a decade of experience to observe	Early-stage project; impacts largely ahead

Source: City of Brownsville and Greater Brownsville Economic Development Corporation

WHAT BROWNSVILLE EXPERIENCED

- **Economic Development & Supplier Ecosystem:** SpaceX's presence elevated Brownsville's profile as an advanced-industry location.
- **Hospitality & Consumer Spending:** Starbase also produces impacts that have little to do with the facility's municipal location. Brownsville estimates individual launches can attract approximately 20,000 spectators, contributing to hotel, restaurant and local spending.

Source: City of Brownsville, Greater Brownsville Economic Development Corporation

WHAT BROWNSVILLE EXPERIENCED

- **Housing & Growth:** SpaceX's economic activity increased hotel, restaurant, salary, and infrastructure spending in Brownsville, creating lodging demand despite Starbase being 25–30 miles away.
 - Rental housing saw early pressure as SpaceX drew workers and out-of-market residents into Brownsville.
 - Housing demand broadened beyond temporary needs, with over 1,600 residential permits issued in 2025, spanning multifamily, duplex, and single-family units, as part of wider economic growth, not solely SpaceX.
 - Starbase has grown into an incorporated community with new homes, condos, and apartments, many occupied by SpaceX employees.

Source: City of Brownsville, Greater Brownsville Economic Development Corporation

HOUSING

Impact	Brownsville/SpaceX Starbase	Potential College Station Relevance
Temporary Workforce & Lodging	Project activity contributed to hotel, restaurant and other local spending despite Starbase being outside Brownsville	Terafab construction could create early demand for hotels, extended-stay lodging, short-term rentals and apartments
Rental Housing	SpaceX-related growth contributed to broader rental and housing demand	College Station's existing rental inventory may position it to absorb a portion of temporary workforce demand
Permanent Housing	Long-term employment contributed to new residential development and higher-value housing demand	Permanent Terafab employees could create longer-term demand across Brazos and Grimes counties
Geographic Distribution	Housing developed both in Brownsville and closer to Starbase	Terafab workers may distribute across College Station, Bryan, Navasota, Grimes County and other nearby communities

Wave 1 – Construction

- Temporary workforce, hotels/extended stay, short-term rentals, rental apartment/homes, restaurant and retail spending, commuting

Wave 2 - Operations

- Permanent employees, homeownership/rental demand, household formation, schools/services, retail, longer-term residential development

Source: City of Brownsville, Greater Brownsville Economic Development Corporation

LESSONS FROM SAMSUNG SEMICONDUCTOR

Taylor, Texas

PROJECT SCALE COMPARISON

	Samsung – Taylor 1,200 acres, 6 million SF + 2.7 million SF	Terafab – Grimes County 6,000 acres, 100 million SF
Initial/Phase I Investment	\$17 Billion	\$16.8 Billion
Direct Jobs	3,000 Phase I	1,500 – 3,000 projected jobs
Industry	Advanced semiconductor fabrication	Vertically integrated semiconductor fabrication
Construction Impact	8,897 on-site construction jobs supported in 2025	4,921 annual average on-site construction workers, Phase I (2026-2028)
Broader Ecosystem	Builds on existing Samsung/Austin semiconductor cluster	Opportunity to build a new semiconductor-related ecosystem tied to SpaceX/Terafab
Host Geography	In Taylor city limits	Outside College Station, in Grimes County

Source: Taylor Economic Development Corporation, Impact Data Source

WHAT TAYLOR EXPERIENCED

- **Economic Development & Supplier Ecosystem:** Samsung's Taylor investment became the anchor for a broader regional recruitment strategy, including a stronger regional semiconductor ecosystem extending beyond the Samsung facility itself. Created additional opportunities with Korean companies.
- **Infrastructure & Transportation:** Taylor was not fully prepared for the scale or pace of infrastructure needs generated by Samsung and the growth surrounding it. The City has since undertaken significant long-range planning and investment in water, wastewater, utilities and transportation to accommodate accelerated growth.

Source: Taylor Economic Development Corporation, Impact Data Source

WHAT TAYLOR EXPERIENCED

- **Construction Impact and Spending:**
 - Construction employment was much larger than the permanent workforce, with nearly 9,000 onsite construction jobs in 2023.
 - Construction workers generated substantial local spending, with nearly 75% of the construction worker spending occurring in Taylor.
 - Samsung reported more than \$1.14 billion in taxable construction spending in Taylor during 2023.
 - Construction activity directly used City of Taylor water service.
- **Housing:** Housing demand was regional, not necessarily confined to Taylor.

Source: Taylor Economic Development Corporation, Impact Data Source

IMPACTS

Impact	Taylor/Samsung	Potential College Station Relevance
Construction Workforce	8,897 onsite construction jobs reported in 2023	Terafab could generate a substantial temporary workforce before permanent operations
Temporary Housing	Taylor hotels experienced high occupancy throughout Phase I construction, camps and RV parks located mostly near the construction site	Hotels, extended stay, apartments, short-term rentals, and rentals could experience early demand
Local Spending	75% of construction-worker taxable spending estimated in Taylor in 2023	College Station could capture meaningful spending despite not hosting the facility
Traffic/Commuting	Workforce moved throughout Taylor/Austin regional market, Taylor has seen a large increase in traffic patterns and transportation infrastructure	Potential increased commuting between Brazos County and Grimes County
Permanent Workforce	3,000 direct jobs created in Phase I	1,500 – 3,000 jobs
Direct Municipal Impact	Taylor hosts facility and receives direct tax, utility and development impacts	College Station primarily experiences regional spillover impacts

Samsung demonstrates that the construction phase of a semiconductor project can create an economic and workforce impact substantially larger than the eventual permanent employment base. For College Station, the earliest Terafab impacts may therefore be felt through lodging, rental housing, commuting, restaurants and consumer spending – even though the facility itself is outside the City.

Taylor is not a perfect geographic comparison because Samsung is located within the Taylor city limits. College Station should expect a smaller share of direct impacts, but potentially a meaningful share of the regional housing and service demand.

Source: Taylor Economic Development Corporation, Impact Data Source

OVERALL IMPACT ASSESSMENT – COLLEGE STATION

Area	Potential Opportunities	Potential Pressures/Risks
Housing	Additional demand can support new residential development; absorption of existing/planned units; opportunity for additional single-family, multifamily and workforce housing	Increased rents/home prices if supply doesn't keep pace; competition for existing rental inventory; affordability pressures; temporary workers could affect apartments, extended-stay hotels and short-term rentals
Construction Workforce	Hotels, restaurants, retail and service businesses could capture substantial temporary-worker spending; local contractors and trades could benefit	Large temporary population could create short-term lodging/rental pressure; construction labor shortages; workers may commute significant distances
Permanent Workforce	1,500 – 3,000 announced Terafab jobs could expand the regional professional/technical workforce; opportunities for residents and TAMU graduates; greater economic diversification	Existing employers could face increased competition for engineers, technicians, skilled trades and other workers; wage pressure and employee turnover
Texas A&M	Opportunity to connect Terafab with TAMU research, engineering, semiconductor talent and graduates; strengthens College Station's value proposition to suppliers	Increased competition for specialized talent, particularly engineering and technical positions; housing/transportation demand layers onto existing university-related activity
Transportation/Traffic	Increased regional connectivity could help justify transportation investments; improved corridors could benefit broader economic development	More commuting between College Station/Bryan and Grimes County; additional traffic on regional corridors; improvements may be needed sooner than currently programmed

OVERALL IMPACT ASSESSMENT – COLLEGE STATION

Area	Potential Opportunities	Potential Pressures/Risks
Infrastructure	Growth may accelerate planned infrastructure investments and expand the City’s tax/customer base where development occurs inside College Station	Residential/commercial growth could accelerate water, wastewater, electric, drainage and road capacity needs; infrastructure may be required earlier than current CIP assumptions
Construction Costs	Larger regional construction market could attract contractors and specialized firms to the area	Competition for contractors, electricians, plumbers, equipment and materials could increase costs and schedules for City capital projects and private development
Commercial/Retail	More workers and households increase purchasing power; opportunity for restaurants, retail, entertainment, healthcare and services	Rapid growth can create demand faster than commercial development responds; construction workforce spending may be temporary
Land/Development	Could accelerate development in southern/eastern College Station and increase demand for underutilized property	Land speculation and increasing land values could affect housing affordability and project feasibility; development may reach infrastructure before infrastructure reaches development
Utilities	Additional residential/commercial customers could strengthen utility revenues and justify strategic system expansion	Growth outside College Station’s utility service areas may limit City influence/revenue; capacity constraints may emerge; development outside City systems may use other providers or alternative solutions

OVERALL IMPACT ASSESSMENT – COLLEGE STATION

Area	Potential Opportunities	Potential Pressures/Risks
City Revenues	New residents, businesses and spending inside College Station could increase sales tax, property tax and utility revenues	Unlike Taylor/Samsung, College Station will not host Terafab, so it will not capture the facility's direct property tax, permitting or utility benefits while still potentially experiencing spillover costs
Public Safety/Services	Broader tax-base growth can ultimately support expanded services	Population and visitor growth could increase police, fire/EMS, development review, code enforcement, parks and other service demands
Economic Diversification	Major opportunity to expand College Station beyond its university-centered economic base into semiconductor, advanced manufacturing, defense/space and technology sectors	Benefits are not automatic; without deliberate recruitment and development readiness, College Station could absorb growth pressures while other jurisdictions capture more investment
Regional Position	Raises the national profile of the Brazos Valley; strengthens the College Station-TAMU value proposition for technology investment	Growth crosses jurisdictional boundaries, requiring coordination with Grimes County, Brazos County, Bryan, Navasota, TxDOT, MPO, utilities and other regional partners

TOP OPPORTUNITIES & PRESSURES

Opportunities:

- Economic diversification
- Additional company attraction
- Workforce and talent retention
- Consumer spending
- Accelerated development

Pressures:

- Construction workforce impacts
- Construction cost escalation
- Transportation
- Housing affordability and supply
- The fiscal balance

READINESS

We Are Well Positioned Because...

- Texas A&M talent/research ecosystem
- Existing housing/development pipeline
- Established hospitality capacity
- Existing retail/service economy
- Strong quality of life
- Development opportunities south/east
- Existing ED/partner network
- Ability to recruit Terafab suppliers
- Regional partnerships
- Existing utility/planning framework

We Need to Prepare For...

- Housing supply and affordability
- Temporary construction workforce
- Regional traffic/commuting
- Construction labor/cost pressure
- Infrastructure timing/capacity
- Development-ready land availability
- Supplier site readiness
- Public-service impacts
- Growth outside City's jurisdiction/control
- Balance between regional impacts and direct City revenues



**COLLEGE
STATION**