

TOMBALL, TEXAS — AT A GENERATIONAL MOMENT

TOMBALL EDC ECONOMIC DEVELOPMENT STRATEGIC PLAN

July 2026



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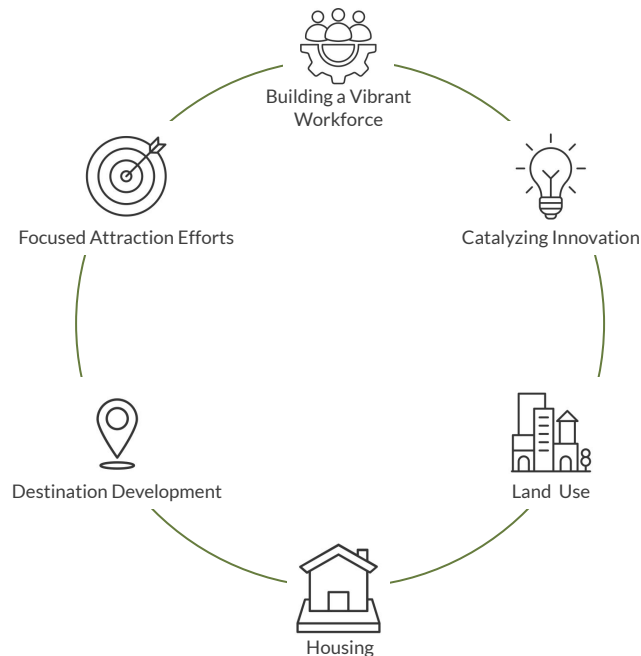
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01. **THE BIG PICTURE**

A NEW PARADIGM FOR ECONOMIC DEVELOPMENT

Economic development today is about shaping the conditions that determine whether a place thrives: the workforce that powers it, the downtown that anchors it, the housing that supports it, the infrastructure that enables it, the small businesses that give it character, and the targeted sectors that build its long-term economic base. Chasing the next deal is no longer enough on its own.

This matters especially for Tomball. The city sits inside one of the largest and fastest-growing regional economies in the United States—a position that generates momentum and pressure in equal measure. Meeting it takes a strategy that treats target-sector development, business retention, workforce alignment, downtown placemaking, redevelopment, and organizational capacity as one connected system. Run as separate programs, they deliver far less.



THE MOMENT

Tomball is in motion—population growing twice as fast as Texas, with income and employment rising faster than the state. But momentum alone doesn't define a community's economic position. The indicators below show both halves of the story: the strength of Tomball's growth, and the gaps that strength hasn't yet closed.

Tomball's growth tracks regional demand more than a distinctive draw.

Demographics, household structure, and income closely mirror northwest Houston averages, with average family size (3.23) and median household income (\$78,562) both landing within a few percentage points of state benchmarks, suggesting the region is pulling Tomball along rather than Tomball anchoring its own niche.

Educated talent is choosing Tomball.

Tomball leads the peer set in educated in-migration at 25.5%, but talent is commuting outward. Daytime economic activity is tied to the broader metro labor market rather than to local employers, with average commute times of 33.4 minutes running nearly six minutes longer than the Texas average of 27.5.

Wages are climbing faster than the state.

Median earnings are up 43.5% since 2019, well above Texas and U.S. rates, but median household income at \$78,562 still ranks among the lowest in the peer set of suburban Houston communities, behind The Woodlands (\$135,645), Pearland (\$135,469), and Sugar Land (\$133,466).

Employment is expanding at twice the Texas rate.

However, specialization in higher-skill, higher-wage occupations remains thin, with creative-class employment at 1.74%—essentially aligned with the Texas average of 1.79% rather than concentrated above it.

Housing costs are among the lowest in the peer set.

Median rent, at \$1,226, is the lowest of any peer community, but the share of rent-burdened households is the highest at 60%. Affordability pressure is concentrated where incomes are tightest.

External pressures could erode the very character that makes Tomball Tomball if left unaddressed.

Water costs are projected to rise four to five times within five years, state preemption of local land use authority, tax cap constraints.

THE TAKEAWAY : A Generational Opportunity to Shape What Comes Next.

The big picture comes down to a single conclusion: Tomball is at a threshold most communities never reach. A rare convergence of public investment is reshaping its physical core just as population, talent, and employment surge, and windows like this don't stay open long.

What happens next isn't predetermined. Fast growth left on its own tends to erase what makes a place distinct—more rooftops, more traffic, less character. Directed with intent, that same growth can sharpen Tomball's identity, anchor more of its economy at home, and turn today's assets into lasting advantage.

Tomball is unusually equipped to take the second path. Its institutional partnership runs deeper than most peers': the EDC, City, Chamber, and educational partners already pull in the same direction, and that capacity, more than any single asset, is what lets a community act on a moment instead of being carried by it. The rest of this plan is how to put it to work.

02.

OUR ENGAGEMENT: WHAT WE DID

WHAT WE ACCOMPLISHED

We mapped Tomball's economy and competitive position, and conducted a focused engagement with the people closest to the work—to ensure the strategy is grounded in real data and real conditions.

Reviewed Tomball's planning and policy foundation, including the City's Comprehensive Plan, the TEDC Strategic Work Plan, incentive policies, and recent market analyses, to surface opportunities and contextual factors shaping the strategy.

Convened a Steering Committee of TEDC Board members, City leadership, and key partners across multiple working sessions to validate findings, test priorities, and ensure the strategy reflects Tomball's operational realities and political context.

Conducted a competitive benchmarking assessment, comparing Tomball to ten peer communities across the Houston region and Texas to identify Tomball's distinctive position and competitive gaps.

Conducted one-on-one stakeholder interviews and roundtables, engaging city, community, and business leaders to surface opportunities, constraints, and ideas from across Tomball's economic base.

Integrated the existing Target Industry Analysis, confirming priority sectors of Biotechnology & Life Sciences, ICT, Advanced Manufacturing, and Food Production & Processing—and aligning strategy recommendations to these defined targets.

Conducted an in-market site visit and economic field tour covering Old Town, the Business and Technology Park, the SH-249 healthcare and key corridors to understand Tomball's economic geography on the ground.

Conducted a BR&E, incentive, and land use review—assessing the TEDC's existing tools, programs, and incentive policies to evaluate strategic readiness across business retention, recruitment, and product development.

Conducted a Joint Retreat with the City Council, EDC Board and Steering Committee to move from strategy to action by aligning leadership around priorities, trade-offs, and what it will take to execute.

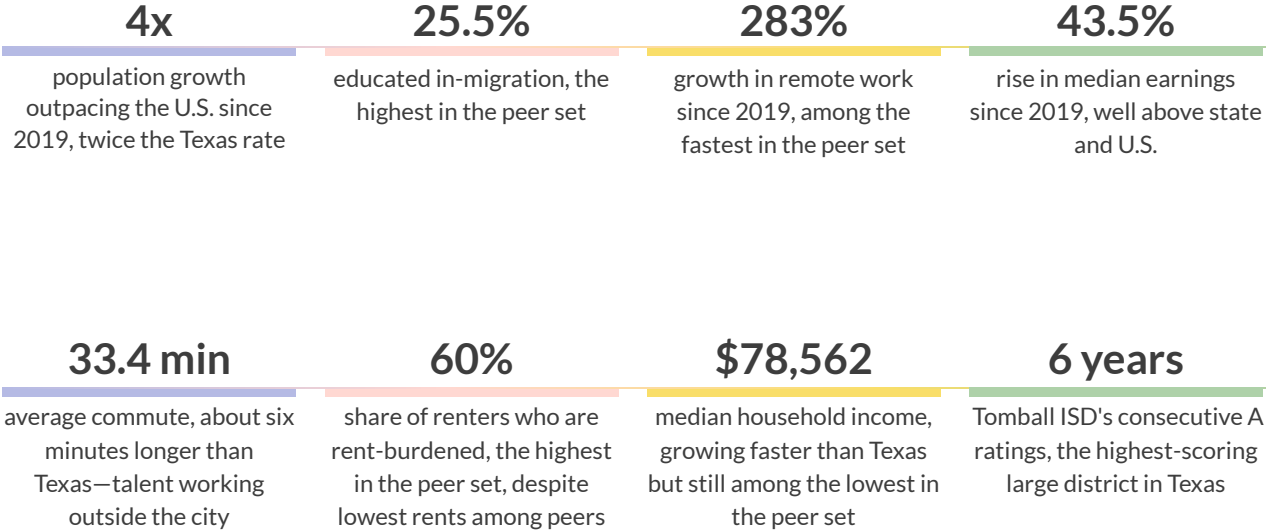
03.

DISCOVERY INSIGHTS

DATA PROFILE:

TOMBALL BY THE NUMBERS

These indicators show both the momentum and the strategic question—a community growing fast, attracting talent, and improving its income, while still working to translate that growth into a more distinctive economic role within northwest Houston.



Five key themes emerged from our engagement.

1

Tomball is growing, but the question is, what comes next?

Tomball's growth reflects regional demand more than a distinct community draw, and the strategic opportunity is to translate volume into definition.

2

Attracting talent, exporting work

Tomball is leading its peers in attracting educated residents, but most of them still find their workday outside the city.

3

Employed, but not deeply specialized

Tomball's workforce is fully employed, but not yet concentrated in the higher-wage sectors that lift incomes and anchor a distinctive economic identity.

4

Tomball institutions are built to execute

One of Tomball's most distinctive assets is institutional: a working partnership across the EDC, City, Chamber, Lone Star College - Tomball, and Tomball ISD.

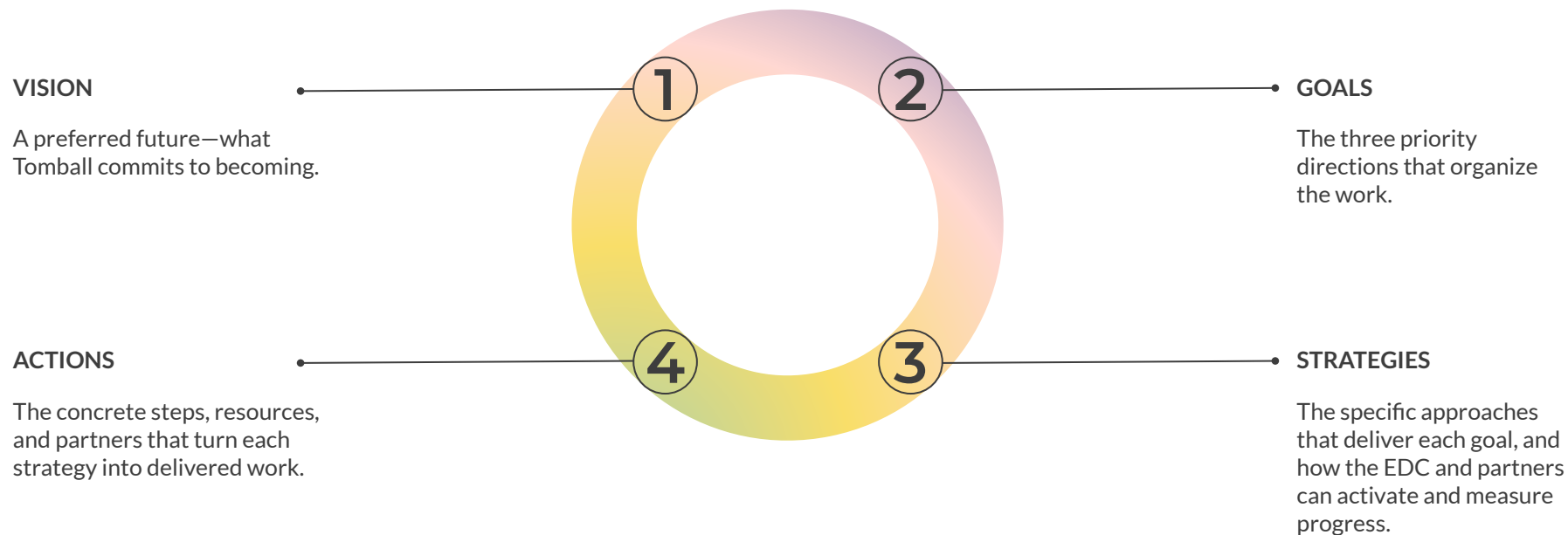
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A Generational Window

The convergence of public investment now underway gives Tomball a rare chance to physically reshape itself so these investments are coordinated, sequenced, and executed together.

04. **STRATEGIC PLAN**

ELEMENTS OF THE STRATEGY: HOW THIS PLAN IS ORGANIZED



MADE IN TOMBALL.

Channeling a generational moment of growth into a sharper economy, a stronger sense of place, and the capacity to carry what comes next—so that what makes Tomball Tomball grows more pronounced, not less.

MADE IN TOMBALL.

Three goals to channel Tomball's momentum into a sharper economy, a stronger sense of place, and the foundation to carry what comes next.

GOAL 1

BUILD THE TOMBALL ECONOMY OF THE NEXT GENERATION.

Specialize the local economy in the sectors that match Tomball's workforce and assets, take care of the employers already here, and build the talent and small-business ecosystem that turns residential success into local economic activity.

GOAL 2

MAKE PLACE AND EXPERIENCE TOMBALL'S COMPETITIVE ADVANTAGE.

Capitalize on the generational window of public investment in Old Town, Legacy Square, and Tomball's signature events to give the community a downtown and a calendar of experiences that no peer suburb can replicate.

GOAL 3

BUILD CAPACITY TO CARRY THE GROWTH.

Strengthen and expand the TEDC's marketing, organizational, and partnership capacity to successfully deliver the organization's strategic goals as Tomball continues to grow.

HOW WILL WE KNOW IF WE'RE SUCCEEDING?

THE ECONOMY IS SPECIALIZING, NOT JUST GROWING.	Recruitment and retention are concentrating in the four priority sectors—biotechnology and life sciences, food production and processing, ICT, and advanced manufacturing—and higher-wage jobs are growing faster than headcount alone.
RESIDENTS ARE FINDING THEIR WORKDAY IN TOMBALL.	Workforce partnerships among Tomball employers, Lone Star College, and Tomball ISD are connecting residents to local jobs, and existing employers are choosing to expand here rather than leave.
THE GENERATIONAL INVESTMENTS ARE LANDING AS ONE.	Main Street, Legacy Square, and the City Hall decision are advancing as a coordinated set that reinforces each other—not separate projects on parallel tracks.
TOMBALL IS A PLACE PEOPLE COME TO, NOT THROUGH.	Old Town and Tomball's signature events—the Farmers Market, German Fest—are drawing visitors, spending, and identity that no peer suburb can replicate.
GROWTH IS BEING SERVED, NOT OUTPACED.	Investment in roads, utilities, water, and drainage is keeping pace with the service population, so recruited growth can actually be delivered.
THE TEDC IS BUILT TO DELIVER.	The organization's staff, tools, and partnerships match the ambition of the plan, and the EDC–City–Chamber–Lone Star College – Tomball–Tomball ISD partnership is moving in the same direction at the same time.

GOAL 1: BUILD THE TOMBALL ECONOMY OF THE NEXT GENERATION.

Specialize the local economy in the sectors that match Tomball's workforce and assets, take care of the employers already here, and build the talent and small-business ecosystem that turns residential success into local economic activity.

WHY IT MATTERS

Tomball is winning the residential competition. Educated residents are choosing the city at higher rates than its peers, population is growing twice as fast as Texas, and remote work has surged. The local economy has yet to catch up: most residents commute outward, median earnings trail comparable peers, and the Business and Technology Park that anchored a decade of recruitment is essentially built out. Closing that gap will take deliberate work on several fronts at once.

The foundations are already in place. Four priority sectors are named—biotechnology and life sciences, ICT, food production and processing, and advanced manufacturing—each aligned with Tomball's workforce, infrastructure, and property base. Lone Star College–Tomball runs the training that feeds the SH-249 healthcare corridor and the manufacturers around it. Tomball ISD pulls families in and produces the next generation of the workforce. And the Type B EDC has the tools—incentives, Old Town redevelopment capacity—to operate at the scale the moment requires.

This goal builds upon the strong foundation the TEDC and its partners have already established. Rather than creating entirely new initiatives, it strengthens existing workforce, business retention, recruitment, infrastructure, and small business efforts by making them more coordinated, measurable, and strategically aligned with Tomball's long-term economic vision.

Build the Tomball Economy of the Next Generation.

- 1.1 Concentrate recruitment around Tomball's four priority sectors to build a steady pipeline of high-fit prospects.
- 1.2 Enhance and formalize the TEDC's existing Business Retention and Expansion (BRE) program by standardizing processes, strengthening data collection, and expanding performance reporting to support employer retention, expansion, and informed economic development decisions.
- 1.3 Formalize and expand existing sector partnerships by establishing recurring industry advisory meetings with employers and our educational institutions.
- 1.4 Support both halves of Tomball's small-business economy—Old Town identity businesses and cluster-adjacent firms that scale jobs and tax base.
- 1.5 Continue and strengthen the TEDC's strategic infrastructure partnership with the City to support future economic growth.

Four target sectors anchor Tomball’s economic strategy.

SECTOR	WHY IT MATTERS	CURRENT STRENGTHS
Biotechnology & Life Sciences	Tomball can serve as a lower-cost, less-congested complement to the Houston medical district—drawing mid-sized clinical support, diagnostics, and applied bioscience firms rather than core research labs. Population growth and an aging demographic keep demand for specialized care climbing.	An expanding ecosystem of outpatient centers, diagnostic imaging, and laboratory services; proximity to the Houston medical ecosystem; and Lone Star College–Tomball health sciences and allied health programs feeding lab tech, medical technologist, and clinical roles.
Food Production & Processing	Strong north–south and east–west corridor access positions Tomball for specialty and value-added food production—niche processors, packaging, distribution, and cold-chain firms serving a fast-growing consumer base.	Existing food distributors, processors, bakeries, and specialty producers; industrial sites suited to small-batch and mid-scale operations; a workforce aligned to production, packaging, and logistics; and the Farmers Market as a launch platform for emerging producers.
Information & Computer Technology (ICT)	Houston's tech ecosystem generates demand for satellite operations and support centers seeking suburban talent and lower costs—and Tomball's other target sectors all need IT services, cybersecurity, and data infrastructure.	A workforce pipeline through Lone Star College and regional partners in support, network, and security roles; established infrastructure and a stable business climate; and cross-sector demand that makes Tomball a natural support hub for applied technology.
Advanced Manufacturing	Newly added large industrial sites let Tomball compete for modern manufacturing that needs scale, high-capacity utilities, and flexible zoning—especially higher-value precision work (measuring and controlling devices, lab instruments, electromedical equipment) tied to healthcare and energy.	A deep regional base—more than 37,500 manufacturing workers across nearly 1,000 establishments and roughly \$13B in annual output within the 60-minute drive region; strong supplier networks; and training through Lone Star College, San Jacinto College, and Texas A&M in welding, machining, instrumentation, and quality control.

Concentrate recruitment around Tomball's four priority sectors to build a steady pipeline of high-fit prospects.

WHY IT MATTERS

Tomball competes for employers in one of the country's most active suburban markets, against peers along SH-249 and the Grand Parkway with larger budgets, larger sites, and more visible identities. A recruitment posture also needs product to sell, and with the Business and Technology Park essentially built out, the EDC's South Live Oak site is the marketable land that keeps Tomball competitive for the projects these sectors generate. The path to winning isn't volume—it's fit. Tomball's four priority sectors (biotechnology and life sciences, food production and processing, ICT, and advanced manufacturing) align with the city's workforce, infrastructure, and property base in ways few peer suburbs can match. The work now is to build the recruitment posture that turns those sectors into a steady pipeline of qualified prospects, coordinating the EDC's tools, sites, and partnerships around them. A disciplined, sector-focused posture is also what gives the EDC its clearest answer when asked the essential question: where are we concentrating, and why?

WHAT'S NEEDED?

- Put the incentive policy's target-sector priority to work.
 - ↳ Uses the priority review and enhanced terms the updated policy gives target-sector projects, so incentive dollars follow the growth Tomball has chosen.
- Build a one-page recruitment profile for each priority sector and include them on the EDC website.
 - ↳ Gives staff and partners a sharp, prospect-facing pitch grounded in the Target Industry Analysis: what Tomball offers each sector and why a firm fits here.
- Run focused outreach to high-fit prospects in the four sectors.
 - ↳ Converts the collateral into an active pipeline and concentrates limited staff time on prospects that match the strategy.
- Bring the South Live Oak site to market as shovel-ready product for target-sector recruitment.
 - ↳ Replaces the built-out Business and Technology Park with competitive, marketable land the EDC can pitch to priority-sector prospects, once the board sets its position on the site's use and disposition.
- Attend relevant target-sector trade shows and participate in Texas Governor's trade missions when possible.
 - ↳ Puts Tomball in front of site selectors and target-sector prospects where deals take shape, generating leads that inbound inquiries rarely produce.

GOAL 2: MAKE PLACE AND EXPERIENCE TOMBALL'S COMPETITIVE ADVANTAGE.

Capitalize on the generational window of public investment in Old Town, Legacy Square, and Tomball's signature events to give the community a downtown and a calendar of experiences that no peer suburb can replicate.

WHY IT MATTERS

In a region full of growing suburbs with comparable demographics, cost structures, and corridors, every economic development organization eventually faces the same question: why here? Tomball's answer is unusual. Most northwest Houston peers can build new—new master-planned communities, corporate parks, mixed-use centers. Few can manufacture what Tomball already has: an Old Town with genuine history and decades of small-business presence, a Farmers Market that draws thousands every weekend, a German Fest that brings the region in twice a year, a Heart of Tomball Alliance running coordinated programming, and the kind of lived-in character that signals to talent, employers, and visitors that Tomball is somewhere, not just near somewhere.

What makes this moment different is the convergence of public investment now reshaping the physical foundation of that identity. The TxDOT reconstruction of 2920/Main Street will rebuild the spine of Old Town. Legacy Square has the potential to become a cultural and community anchor of a kind Tomball has never had, if it is executed with the discipline its scale demands. And a decision on City Hall's location is in play that will influence downtown parking, land use, and investment. These pieces are converging in roughly the same window, and none reaches its full potential alone. Each shapes what the others can become.

This goal treats place and experience as economic development. It commits to an Old Town that works as Tomball's most active marketing asset and small-business platform; to Legacy Square executed with the discipline its scale requires; and to the signature events and programming as economic infrastructure that builds the brand, supports small business, and gives people reasons to choose Tomball. Place and experience are where Tomball's competitive advantage lives: the one thing a peer suburb cannot build new.

Make Place and Experience Tomball's Competitive Advantage.

- 2.1** Resolve the Legacy Square and City Hall decisions that will shape Old Town's next decade.

- 2.2** Lead Legacy Square's activation with the discipline its scale demands—clear scoping, sound financing, and programming built in from the start.

- 2.3** Strengthen Old Town's physical fabric and small-business base through the Main Street reconstruction.

- 2.4** Treat Tomball's events and cultural programming as economic infrastructure that builds the brand and supports small business.

GOAL 3: **BUILD CAPACITY TO CARRY THE GROWTH.**

Strengthen and expand the TEDC's marketing, organizational, and partnership capacity to successfully deliver the organization's strategic goals as Tomball continues to grow.

WHY IT MATTERS

A strategy delivers only as much as the organization behind it can execute. Tomball is asking itself to do an unusual amount over the next three years—recruit in four target sectors, enhance the structured BR&E program, formalize and expand sector partnerships with Lone Star College and Tomball ISD, expand the small-business agenda, lead Old Town placemaking, manage Legacy Square, and sustain the signature events that anchor the city's identity. Delivering that agenda depends on three capacities the EDC controls directly: a marketing posture that tells Tomball's story consistently, the organizational discipline that converts strategy into delivered results, and the partnerships that align the EDC with the City, its institutions, and the wider community.

The first two are where the EDC's reach extends furthest. Tomball's external story is told inconsistently today: the EDC, the Chamber, elected officials, and partner organizations speak in language that doesn't always align, leaving a gap between what the city has accomplished and how site selectors, talent, and visitors perceive it. As Tomball continues to grow, the TEDC's existing responsibilities are expanding in both scale and complexity. Successfully delivering this next phase will require continued investment in organizational systems, performance measurement, communications, and partnerships. Building the systems, governance, and reporting capacity to carry that work is what makes this plan deliverable rather than merely aspirational.

Partnerships are the third. Much of this plan depends on the EDC working in concert with the City, Lone Star College, Tomball ISD, the Chamber, and the broader community—and on the civic infrastructure that lets the board, Council, and public move together rather than at cross-purposes. Core physical infrastructure, the other system this growth depends on, lives in Strategy 1.5, alongside the recruitment its Type B investment enables. Goal 3 concentrates on the capacity that wraps around every other goal: telling Tomball's story well, building an EDC equal to its strategy, and deepening the partnerships that carry the work beyond what the EDC can do alone.

Build Capacity to Carry the Growth.

- 3.1 Lead a coordinated economic development marketing and communications effort so public perception reflects the community's accomplishments and competitive advantages.

- 3.2 Grow the TEDC's organizational capacity in step with the strategy—systems, governance, and financial discipline.

- 3.3 Deepen the partnerships and civic engagement that carry the work beyond what the EDC can do alone.

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