



SOUTHWESTERN RAIL CONFERENCE

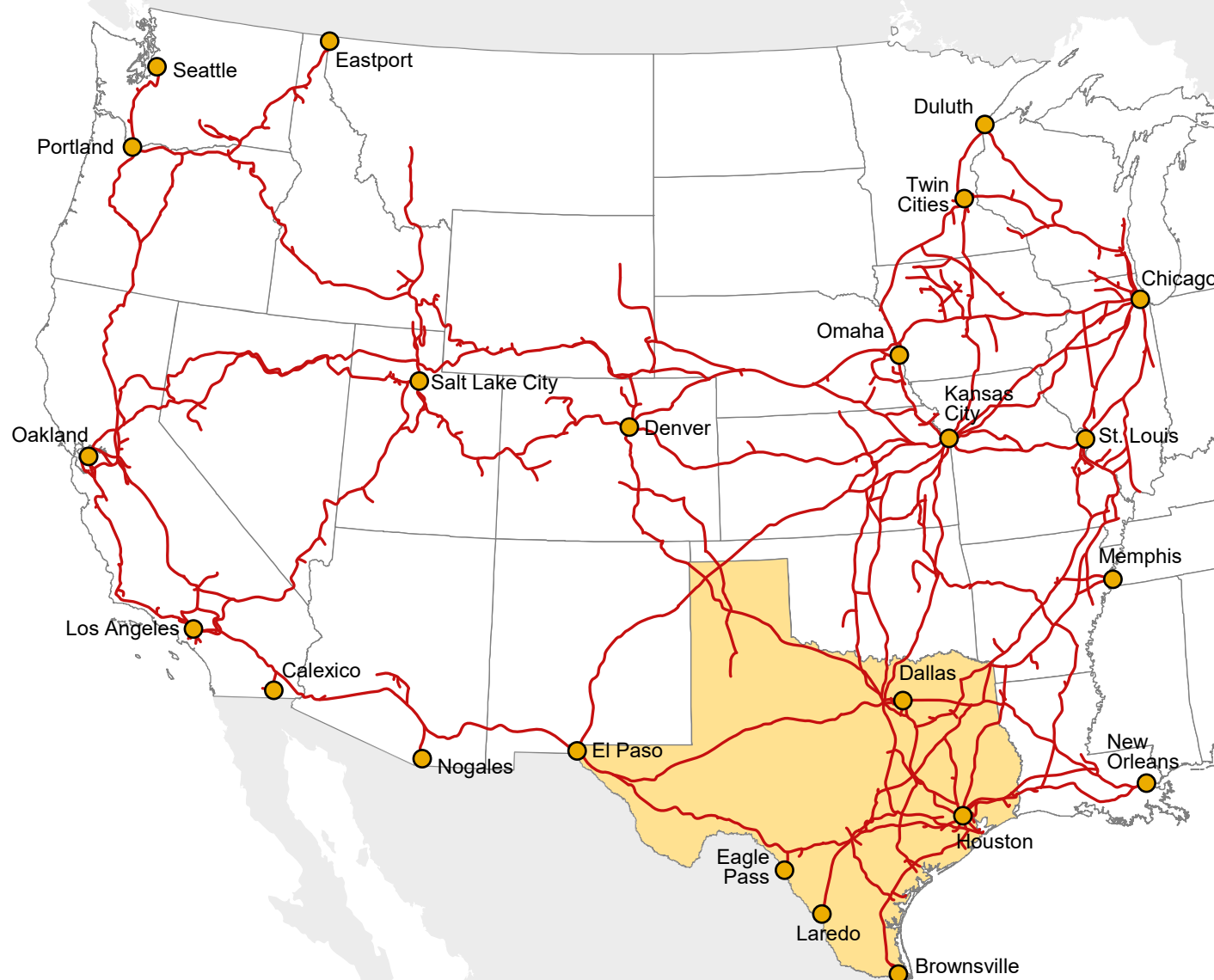
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EMERGING RAIL PARKS IN TEXAS

Brian Siegman – Director, Corporate Strategy and Development, Union Pacific

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Importance of Texas to Union Pacific Network



2025 Fast Facts

- Miles of Track: **6,503**
- Annual Payroll: **\$770.3M**
- In-State Purchase: **\$1.7B**
- Capital Investment: **\$696M**
- Employees: **5,580**
- Annual Carloads: **2.2M***
- Community Giving: **\$1.1M**
- Industrial Development: **>25% of network track construction projects**

* Includes originated and terminated in Texas



Development to Support Customer Growth



UP Land

- **Land Ownership:**
 - ~1,500 sq mi
 - ~1M acres
- **Commercial Viability:**
 - 10,000+ acres
- **Tract Sizes:**
 - 5 – 1,000+ acres

★ Active Projects

● Opportunity



SAN ANTONIO LOGISTICS PARK

SECTION III

NORTHERN TRACTS: 276 AC

BUILDING A
1,300,000 SF





SAN ANTONIO LOGISTICS PARK

WHY SAN ANTONIO?

Growth, Momentum, & Diversity



- Majority-minority community with >56% Hispanic population
- Diverse mix of industries with a strong foundation in advanced manufacturing and automotive
- 45,000+ Firms with tens of thousands employed in Manufacturing, Information, Financial, and Professional Services in the MSA

Competitive Cost



- No state personal income tax
- Cost of living over 7 percentage points below national average
- Median sale prices of homes in the metropolitan area is ~\$310,000
- Affordable real estate, land, energy and water

Workforce & Talent Pipeline



- 2.6% - 3.7% annual labor force growth outpacing national rates
- 46 Universities, Colleges, and Trade Schools in the region
- 168,000 students enrolled in area institutions
- 566 Target industry related educational programs
- 30,000+ completions annually



Population Present	Population 2040
2.8 Million	3.5 Million
GDP Present	GDP 2040
\$182.1 Billion	\$475 Billion
Labor Force Present	Labor Force 2040
1.34 Million	1.87 Million

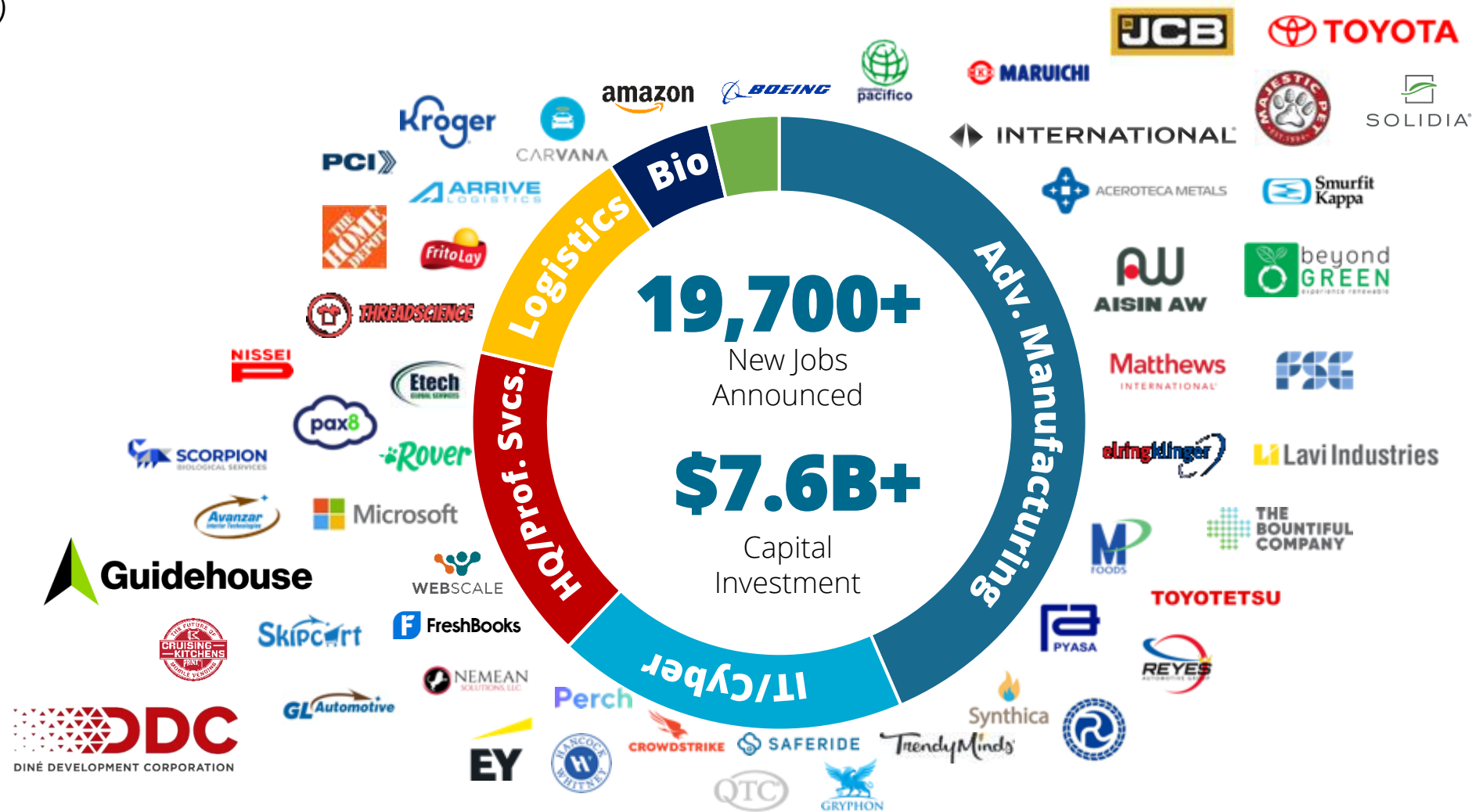




SAN ANTONIO LOGISTICS PARK

Greater San Antonio Recent Relocations & Expansions

(2021-current)

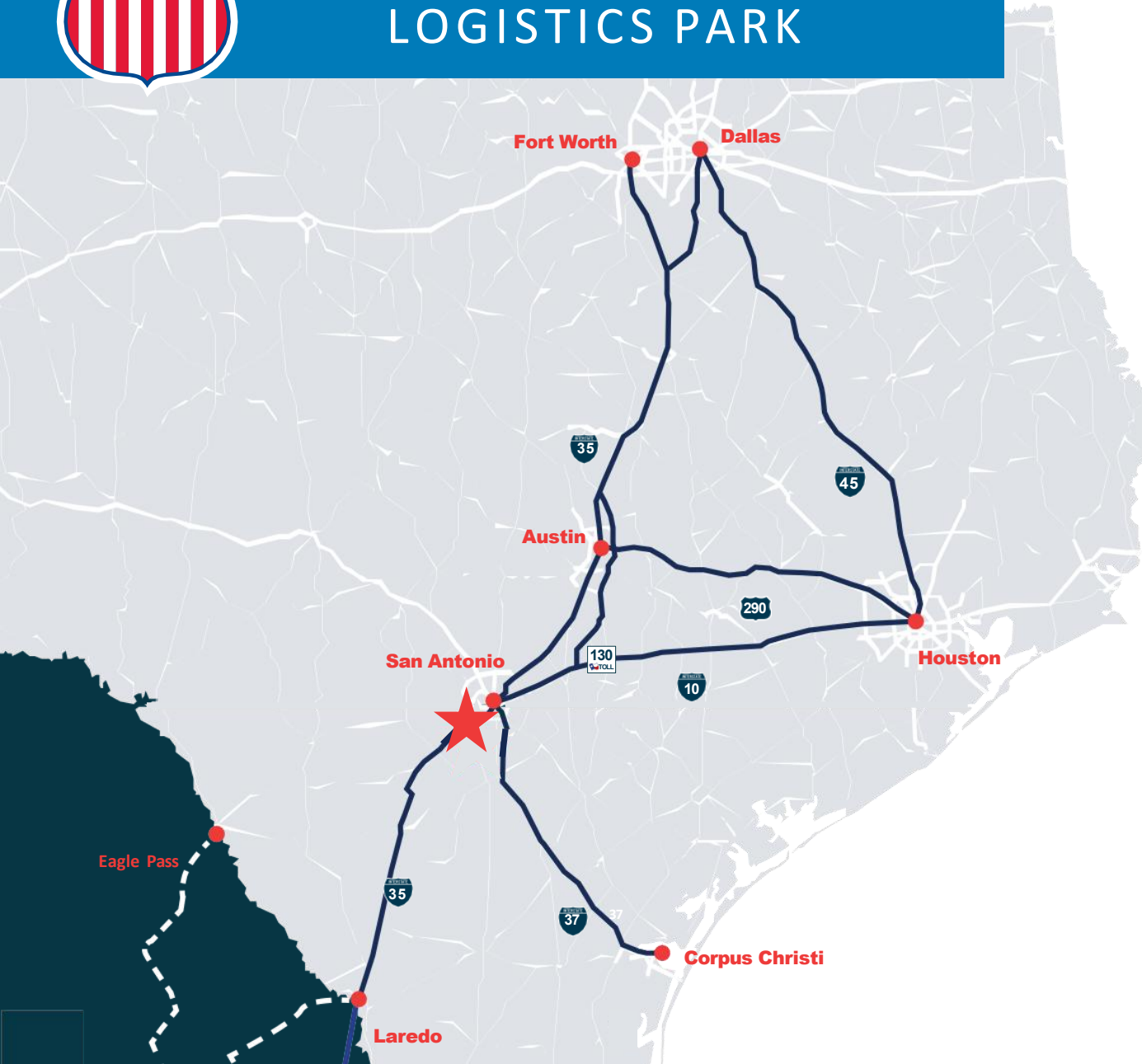


Source: Greater SATX Regional Economic Partnership





SAN ANTONIO LOGISTICS PARK



- Key Growth Corridor along I-35 Connecting Central Texas with Mexico and Canada
- The 588-mile stretch of the I-35 Corridor is Expected to Experience Substantial Growth, Driven by Increased Demand for Goods, Services, and Logistics Support.
- Onshoring and Nearshoring Efforts Continue to Boost Manufacturing and Production in the Region

DISTANCES FROM SITE	
AUSTIN	92 MI
EAGLE PASS	133 MI
LAREDO	142 MI
HOUSTON	207 MI
FORT WORTH	281 MI
DALLAS	286 MI
MONTERREY	286 MI





SAN ANTONIO LOGISTICS PARK



Scale, Flexibility, Infrastructure & Direct Rail Service

San Antonio Logistics Park is the newest industrial logistics and manufacturing hub in Central Texas, strategically located alongside Union Pacific Railroad’s advanced San Antonio Intermodal Terminal (SAIT). This proximity allow businesses to lower transportation costs and optimize supply chains. Situated in the southwestern part of San Antonio, the park is directly on the Interstate 35 corridor, a vital route in the international supply chain that links Mexico, San Antonio, Austin, Dallas-Fort Worth, and the rest of the U.S



Co-Located with Union Pacific Intermodal Terminal



Intermodal & Direct Rail Served



Utility Capacity Available for Heavy Users



Superior Accessibility on I-35 Corridor



Central to The U.S., Gateway to Mexico



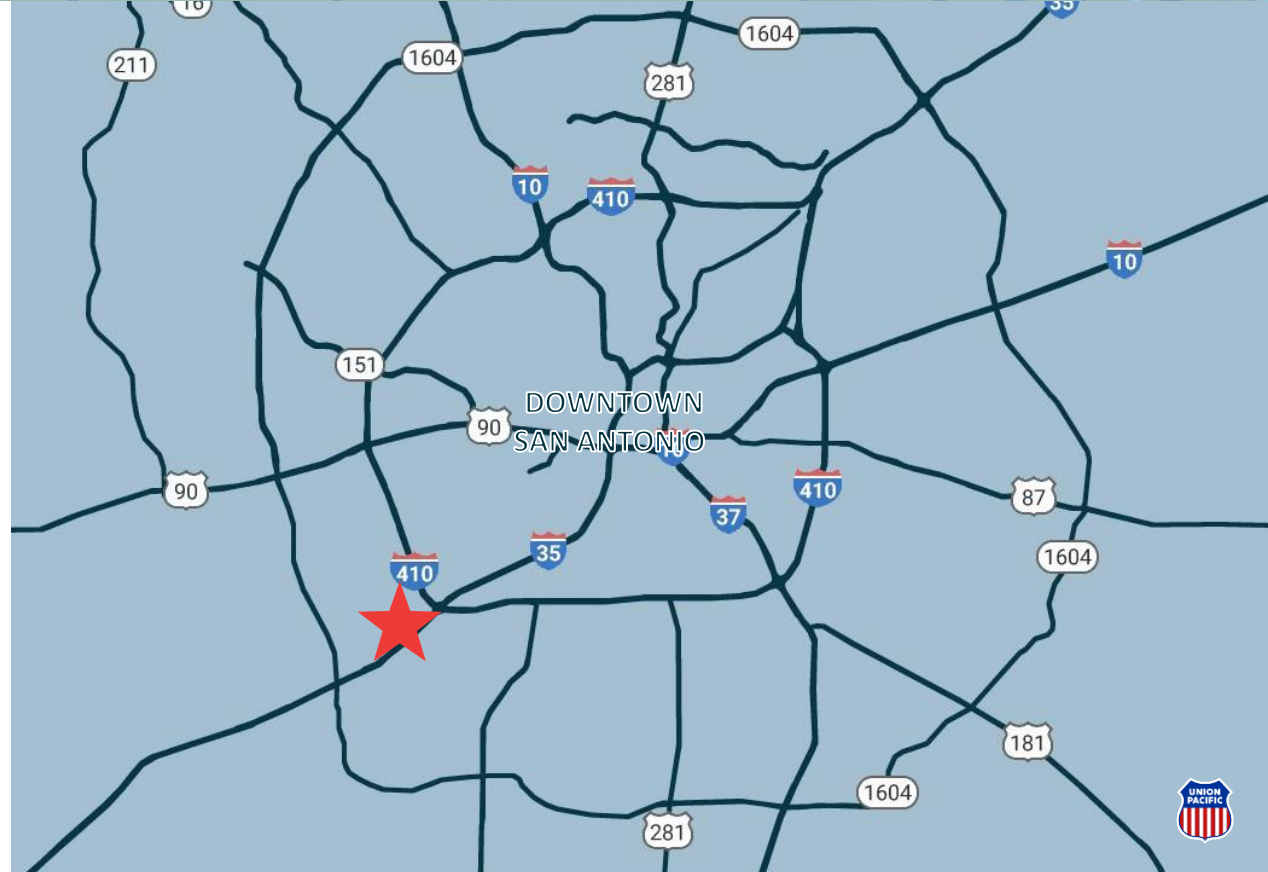
Heavy-Haul Campus with Private Interior Service Load



Opportunity Zone & Foreign Trade Zone - Capable



Build-To-Suit Options Available



SECTION III



SAN ANTONIO LOGISTICS PARK

SECTION I SOUTHERN TRACTS

Size: **156 Acres**

Building A: **893,760 SF**

Building B: **336,960 SF**

Building C: **284,580 SF**

SECTION II CENTRAL TRACTS

Size: **225.4 Acres**

Building A: **240,840 SF**

Building B: **596,160 SF**

Building C: **868,320 SF**

Building D: **907,200 SF**

SECTION III NORTHERN TRACTS

Size: **276 Acres**

Building A: **349,920 SF**

Building B: **689,880 SF**

Building C: **989,520 SF**

Building D: **1,388,800 SF**

SECTION II

SECTION I

HIGH LEVELS
OF UTILITIES

HEAVY HAUL
ROAD

Conceptual site plan only. Plan can be changed to accommodate user needs.





MAINLINE

TEXAS INDUSTRIAL PARK



Direct Union Pacific mainline frontage with on-site railcar storage



Centrally located in the U.S., providing superior North American coverage



Gulf Coast's newest major rail-served logistics hub



Superior accessibility on U.S. 90, Spur 10, Hwy 36, & I-69



Up to ±20MM SF rail-served building potential



WHY ROSENBERG IN GREATER HOUSTON?

- One of the fastest-growing and most resilient U.S. metros
- Global logistics hub with unmatched port, rail, and highway access
- Strong population and job growth driving long-term industrial demand
- Fort Bend County offers available land, affluence, and proximity to Houston's core economy

GLOBAL LOGISTICS ADVANTAGE

- #1 U.S. port by tonnage (Port Houston)
- Class 1 railroads + major interstate network
- 180+ nonstop global destinations via 2 international airports
- Direct access to I-10, I-69, SH 99 & Fort Bend Parkway

INDUSTRIAL STRENGTH

- 7,200+ manufacturing facilities | \$100B+ annual output
- 5,600+ logistics & warehousing operations
- 149,000+ logistics workforce
- Leading industries: Energy, Manufacturing, Logistics, Life Sciences

TALENT PIPELINE

- 7.8M population with a 3.4M workforce
- 40+ colleges with 400K+ students
- Fort Bend:
Highly educated workforce (57%+ degree holders)
Median household income ~\$108K

HOUSTON AT A GLANCE

GROWTH, SCALE & DIVERSITY

- 4th largest U.S. city
- 7.5M+ metro population and growing
- 1 in 4 residents foreign-born (top U.S. diversity market)

COMPETITIVE COST

- No state income tax
- Cost of living below national average
- Lower land costs vs. major coastal markets
- Local & state incentives available (tax abatements, grants)

WORKFORCE & GROWTH

- Fort Bend population: 921K → 1.27M by 2040
- 40% growth in Fort Bend (2010–2020), outpacing U.S.
- Rapid residential expansion supporting labor force growth

Source: Greater Houston Partnership, fortbendcountytexas.gov

INTEGRATED INTERSTATE & RAIL CONNECTIVITY

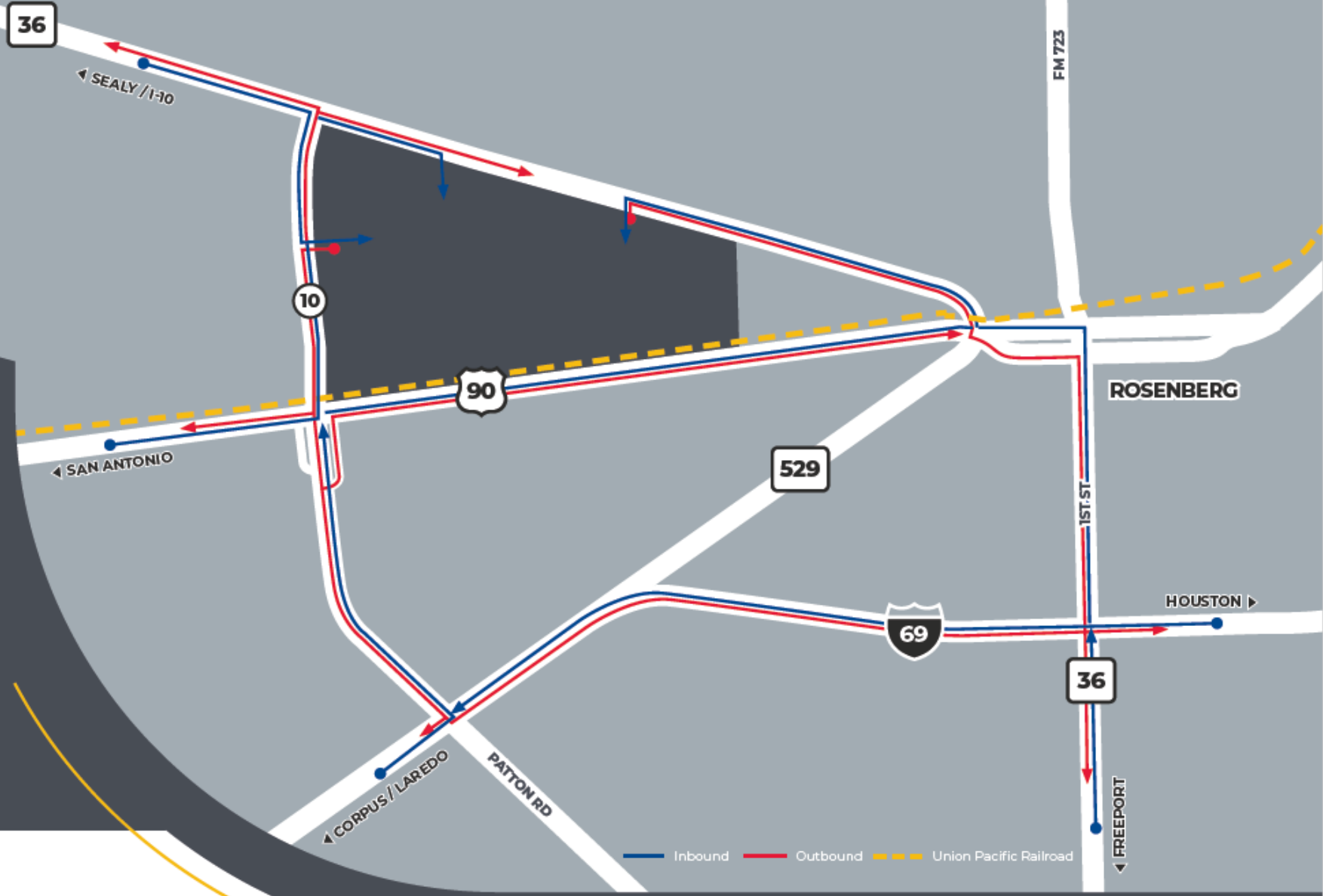
Mainline Texas Industrial Park offers connectivity to Texas' most critical trade and transportation corridors. Positioned along the Union Pacific mainline with direct access to U.S. 90, Highway 36, and Interstate 69, the park provides seamless movement of goods across every major Texas region - including the Port of Houston, Port Freeport, Port Corpus Christi, and Port of Brownsville. Its strategic location also connects to Union Pacific's key international gateways in Laredo, Eagle Pass, El Paso, and Brownsville, linking Rosenberg to the U.S.-Mexico trade network and beyond. Situated within the heart of the Texas Triangle - home to the state's largest concentration of population, industry, and commerce - the park enables users to efficiently reach more than 25 million consumers within a 250-mile radius. This unparalleled access positions Rosenberg as a premier hub for manufacturing, logistics, and rail-served operations, offering unmatched efficiency for companies requiring both domestic and cross-border distribution capabilities.

DISTANCES FROM MAINLINE TEXAS INDUSTRIAL PARK

HOUSTON	38 MI
AUSTIN	141 MI
SAN ANTONIO	172 MI
DALLAS	256 MI
FORT WORTH	264 MI
LAREDO	283 MI
EAGLE PASS	312 MI
BROWNSVILLE	321 MI
EL PASO	722 MI



STRATEGIC REGIONAL ACCESS



±1 Mi
Rosenberg

±38 Mi
Houston CBD

±55 Mi
Bush IAH

±66 Mi
Port of Houston

±60 Mi
Port of Freeport

±177 Mi
Port of Corpus Christi



ACCESS TO LABOR

10 MI	49,048 2025 Total Workforce	26.1% Blue Collar Workers
20 MI	377,618 2025 Total Workforce	27.8% Blue Collar Workers
30 MI	1,322,983 2025 Total Workforce	30.6% Blue Collar Workers

ACCESS TO CONSUMERS

10 MI	226,998 Total Population	\$135,447 Average HH Income
20 MI	1,330,555 Total Population	\$131,087 Average HH Income
30 MI	3,063,192 Total Population	\$129,241 Average HH Income

*Source: Lightcast, Hydra



±2,040 AC

Master-Planned Industrial Park

5 - 1,000 AC

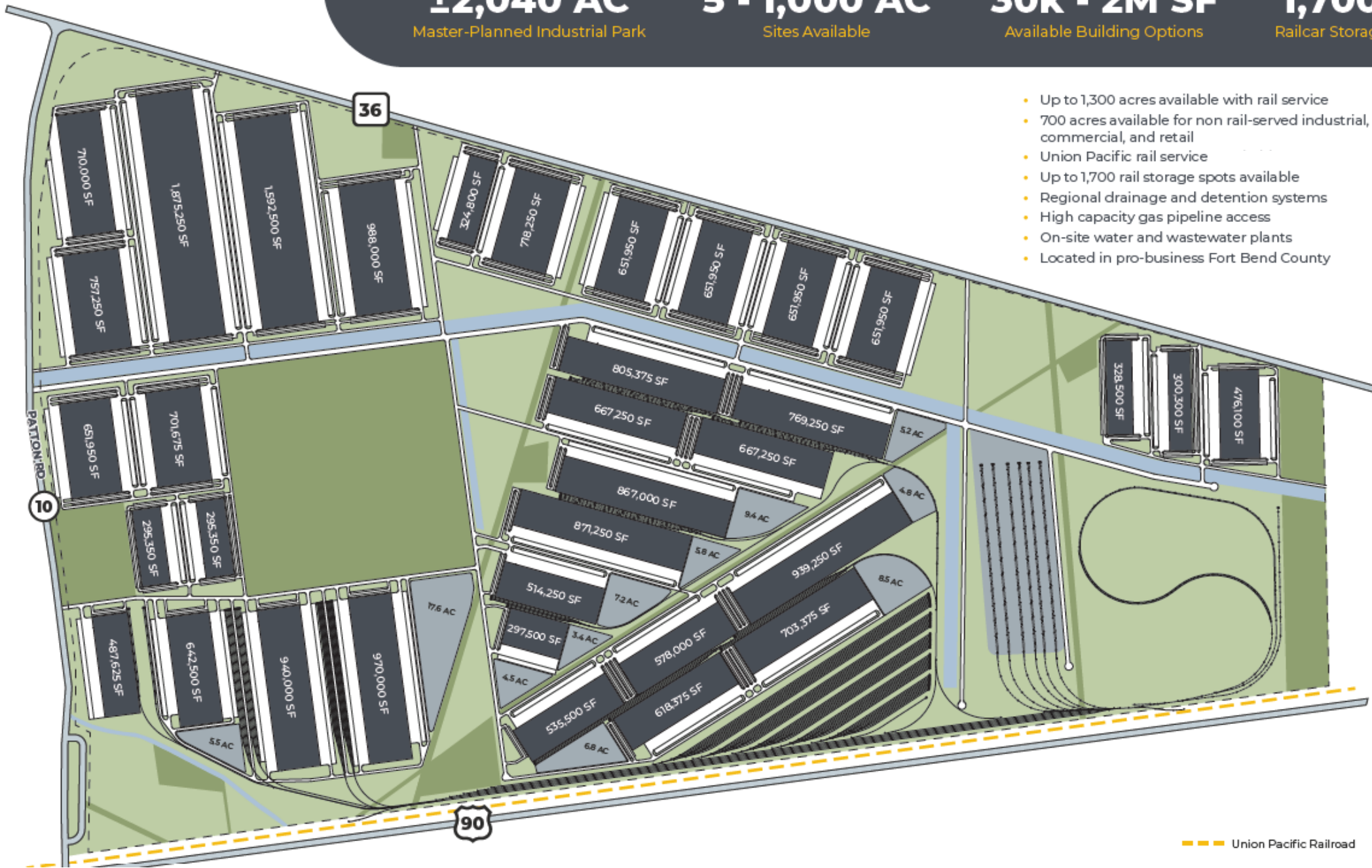
Sites Available

30k - 2M SF

Available Building Options

1,700

Railcar Storage



- Up to 1,300 acres available with rail service
- 700 acres available for non rail-served industrial, commercial, and retail
- Union Pacific rail service
- Up to 1,700 rail storage spots available
- Regional drainage and detention systems
- High capacity gas pipeline access
- On-site water and wastewater plants
- Located in pro-business Fort Bend County

--- Union Pacific Railroad



THANK YOU!

