FREMONT

Request for Proposal

Rail Investment, Operation, and Marketing Partnership for the Fremont Inland Port

Issued by: Greater Fremont Development Council
Issue Date: April 01, 2026
Proposal Due Date: June 30, 2026

GREATER FREMONT DEVELOPMENT COUNCIL

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1. INTRODUCTION

The Greater Fremont Development Council (GFDC), in partnership with the Fremont Municipal Inland Port Authority (FMIPA), hereby issues this comprehensive Request for Proposal (RFP) to solicit a strategic partner to finance, operate, and co-market the rail infrastructure for the new Fremont Inland Port. This RFP requires bidders to submit two distinct financial scenarios: a Base Proposal (100% private funding) and an Alternate Proposal that models the impact of a potential capital contribution secured by FMIPA/GFDC through external grant funding.

The Fremont Municipal Inland Port Authority is a political subdivision created by the City of Fremont and Dodge County to promote, finance, and develop a 1,500-acre industrial park called the Fremont Inland Port. FMIPA can issue revenue bonds, hold, sell, and develop land within the industrial park, and pursue grant funding.

The Greater Fremont Development Council is a 501c6 economic development organization charged with securing job creation and capital investment in the Greater Fremont area. GFDC markets the Inland Port to prospective tenants, may apply for grants, and assists with administrative tasks of the FMIPA.

2. PROJECT DESCRIPTION

The Fremont Inland Port is a premier, 1,500-acre logistics hub strategically located at US-275 and Morningside Road. The site is zoned "Port Authority" by the City of Fremont and will feature a direct interchange with the Union Pacific Railroad, allowing for industrial and logistics uses through a conditional use permit. This flexible approach is designed to create a regional hub for advanced & general food manufacturing, meat processing, warehousing, and multi-modal distribution, with all uses subject to city approval to ensure they align with the community's long-term vision. GFDC holds options on the majority of the site's property. GFDC & FMIPA are particularly interested in securing tenants which bring large numbers of jobs to the region.

3. DETAILED SCOPE OF WORK

The Scope of Work defines the Concessionaire's responsibilities as the primary financial and operational partner for the Fremont Inland Port. It is explicitly understood that the provision of professional engineering and design services, as well as direct construction services, is excluded from the Concessionaire's responsibilities under this agreement. These professional and construction services will be procured and managed separately by FMIPA.

The Concessionaire's scope is broken down into three primary phases:

3.1 Phase 1: Investment and Financing

This phase covers the initial capitalization and development of the Fremont Inland Port rail infrastructure. The Concessionaire's role is one of financial stewardship and technical oversight to protect its investment and ensure long-term operational viability. The Concessionaire shall Secure and provide the private capital required to fully fund the construction of the initial rail infrastructure, based on the designs provided by GFDC's engineering consultant.

3.2 Phase 2: Rail Operations, Maintenance, and Commercial Partnership

This phase represents the long-term, core function of the partnership. Upon operational commencement, the Concessionaire shall:

Rail Operations:

- Provide safe, reliable, and exclusive rail switching and car handling services for all rail-served tenants within the Fremont Inland Port.
- Provide, staff, and maintain all necessary locomotives and equipment to execute all service requirements.
- Develop, implement, and adhere to a comprehensive Safety & Operating Plan (S&OP) that has been approved by FMIPA.
- Manage all aspects of the interchange of railcars with the Union Pacific Railroad.
- Serve as the single point of contact for all park tenants regarding daily rail service.

Asset Maintenance:

- Develop and execute a comprehensive track inspection and maintenance program compliant with FRA standards and AREMA recommended practices.
- Perform all routine, preventative, and corrective maintenance for all rail infrastructure.
- Manage vegetation control and snow removal for all rail rights-of-way.

Commercial Management and Marketing Partnership:

- Act as a key technical and commercial partner to GFDC in marketing the Fremont Inland Port to prospective tenants.
- Manage all billing and accounts receivable for rail services provided to tenants.

3.3 Phase 3: Long-Term Development and Strategic Partnership

The Concessionaire is expected to be a proactive partner in the park's long-term growth and success. The Concessionaire shall:

Future Growth Planning and Advisory Services:

- Proactively identify and recommend FMIPA/GFDC opportunities to enhance the park's rail service offerings and value proposition, such as developing transloading capabilities, car cleaning services, or dedicated storage yards.

- Act as FMIPA's primary operational and commercial advisor during the planning phase for all future infrastructure expansions. The Concessionaire's role in this capacity is to provide critical input on:

  - Operational Feasibility: Reviewing conceptual designs prepared by GFDC's consultant to ensure they are efficient to operate, are maintainable, and do not create service bottlenecks or safety concerns.

  - Commercial Viability: Providing market insight into the potential demand, competitive positioning, and revenue potential for proposed new services or expansions.

  - Capital and Operating Cost Estimates: Assisting FMIPA's planning efforts by developing high-level budget estimates for capital costs and detailed pro-formas for the future operating costs associated with a proposed expansion.

- This advisory role explicitly excludes the provision of professional engineering services. All final design, detailed engineering, and stamped drawings for future expansions will be procured separately by FMIPA/GFDC from a qualified engineering consultant of its choosing.

Expansion Execution:

- Partner with FMIPA to plan and provide financing for future rail infrastructure expansions to support the long-term growth and competitiveness of the Fremont Inland Port.

- Develop capital cost estimates and operational pro-formas for proposed expansions to support joint investment decisions.

Relationship Management:

- Maintain a strong, professional working relationship with the Union Pacific Railroad and with park tenants to ensure high levels of satisfaction and retention.

4. PROPOSAL REQUIREMENTS

Proposals must be submitted in the following format and include, at a minimum, the following sections:

4.1 Executive Summary

A concise overview of the proposal, proposed partnership structure, and key financial terms.

4.2 Corporate Experience

Detail the firm's history in financing, developing, and operating greenfield industrial rail projects within a P3 framework.

4.3 Technical and Operational Proposal

A detailed plan for executing all three phases, including a specific section on your proposed Marketing Partnership Approach.

4.3.1 Optional - Committed Commercial Opportunity

Bidders who have an existing relationship with a potential shipper, receiver, or transload operator that represents a tangible, near-term commercial opportunity for the Fremont Inland Port are strongly encouraged to detail it in this section. Providing this information allows FMIPA/GFDC to assess the project's accelerated path to viability and reduced market risk.

If presenting a committed opportunity, your proposal must include:

- Opportunity Overview: A detailed description of the customer, the commodity, the projected annual carload volumes, and the anticipated start date of operations.
- Evidence of Commitment: Verifiable evidence of commercial discussions. A signed, non-binding Letter of Intent (LOI) or Memorandum of Understanding (MOU) with the potential customer is highly preferred. At a minimum, a detailed summary of negotiations and customer requirements must be provided.
- Infrastructure Requirements: A description of any specific track configuration, loading/unloading infrastructure, or property requirements needed to serve this customer.
- Pro-Forma Impact: A clear explanation of how this specific opportunity and its projected volumes are integrated into your Commercial Pro-Forma (as required in Section 4.4.1).

4.4 Financial Partnership Model (Dual Scenario Requirement)

This section is the most critical component of your proposal. FMIPA/GFDC is seeking a partner with a transparent, sustainable, and well-justified financial plan. Bidders must provide two complete and independent financial plans as follows:

4.4.1 - Base Proposal (100% Private Funding Scenario)

This proposal shall assume the Concessionaire is responsible for financing 100% of the initial capital investment. It must detail:

1. Financing Structure and Capital Investment Plan: A detailed narrative outlining sources and uses of funds, evidence of equity commitment, and any term sheets for proposed debt.

2. Commercial Pro-Forma: A detailed, year-by-year Commercial Pro-Forma (minimum 20-year outlook) provided as a spreadsheet appendix. The Pro-Forma must clearly state all key assumptions driving revenue (e.g., carload projections by type) and operating/maintenance cost projections. If an Optional Committed Commercial Opportunity (per Section 4.3.1) is included, its associated carload volumes must be separately and clearly identified within the pro-forma's revenue projections.

3. Revenue-Sharing Model for FMIPA: This must include:

    - A narrative explaining *why* you chose the proposed model (e.g., tiered, minimum annual guarantee (MAG), flat percentage).

    - A clear definition of all terms, specifically "Gross Revenue" and any proposed deductions.

    - A table clearly outlining the proposed structure, percentages, and/or guaranteed amounts.

    - A year-by-year projection of payments to FMIPA that ties directly to your Commercial Pro-Forma.

4. Risk Register and Mitigation Matrix: A matrix identifying key project risks (e.g., construction overruns, market/volume risk, operational risk) and proposing the allocation of each risk between the Concessionaire and FMIPA, along with proposed mitigation strategies.

4.4.2 - Alternate Proposal (50% Community Investment)

FMIPA and GFDC are actively pursuing state and federal grant opportunities to reduce the total private capital required for the project. This Alternate Proposal allows GFDC to evaluate the financial impact of this potential grant funding. This proposal shall be based on a hypothetical public investment into the project. For the purposes of this Alternate Proposal, bidders shall assume a capital contribution of $12.5 million, representing the proceeds of a successful grant award secured by FMIPA/GFDC, to be applied directly to the initial construction costs. This proposal must provide revised versions of all items listed in 4.4.1, including:

- The revised Financing Structure and Commercial Pro-Forma.

- An enhanced Revenue-Sharing Model for FMIPA. It is FMIPA’s explicit expectation that this model will demonstrate significant value enhancement for FMIPA, reflecting the reduced financial risk.

The final Concession Agreement will be a detailed legal document. However, all proposals submitted in response to this RFP must be based upon and acknowledge the bidder's acceptance of the following foundational commercial and legal principles. These terms will form the basis of the final agreement.

5. KEY COMMERCIAL AND LEGAL TERMS

5.1 Nature of the Agreement

The relationship between the selected partner (the "Concessionaire") and FMIPA will be governed by a long-term Concession Agreement. Through this agreement, FMIPA grants the Concessionaire the exclusive right and license to operate, maintain, and generate revenue from the rail infrastructure within the Fremont Inland Port, in exchange for the Concessionaire's assumption of the financial, operational, and development obligations outlined in this RFP.

5.2 Asset Ownership

FMIPA or GFDC shall hold full and unencumbered legal title to all real property and fixed rail infrastructure at all times. All infrastructure financed by the Concessionaire will be legally deemed the property of FMIPA/GFDC immediately upon its construction and acceptance by FMIPA. The Concessionaire is granted a long-term leasehold interest or license, providing the exclusive right to use, maintain, and generate revenue from this FMIPA/GFDC-owned asset for the duration of the Concession Term. This right does not constitute an ownership interest in the physical asset itself.

5.3 Term of Agreement

The initial Concession Term will be for a significant duration, sufficient to allow the Concessionaire a reasonable opportunity to earn a return on its investment. Bidders must propose the specific number of years for the initial term. The agreement will outline specific conditions and performance metrics that must be met to exercise any options for renewal.

5.4 Compensation and Revenue Model

The Concessionaire's financial model will be based on the following structure:

Primary Compensation: The Concessionaire's compensation and return on investment will be derived exclusively from fees charged directly to park tenants for rail services (e.g., switching, demurrage, storage).

Revenue Sharing with FMIPA: This primary compensation is subject to the Revenue-Sharing Model proposed by the bidder. The Concessionaire shall make regular payments to FMIPA based on the agreed-upon structure (e.g., percentage of gross revenue, tiered model, etc.).

Performance Deductions: The Concessionaire's revenue is subject to financial deductions based on the Performance Regime outlined in Section 6.3. These deductions function as service credits to FMIPA for the Concessionaire's failure to meet key operational performance standards.

5.5 Insurance and Performance Guarantees

The Concessionaire’s ability to manage risk and guarantee performance is fundamental to this partnership. The following terms outline the minimum requirements that must be addressed in all proposals.

5.5.1 Insurance Requirements

The Concessionaire, at its sole cost and expense, shall procure and maintain in full force and effect throughout the entire Concession Term a program of insurance designed to protect the Concessionaire, FMIPA, GFDC, and the public from all claims, liabilities, and losses arising out of the Concessionaire's operations under this agreement.

In their proposal, bidders must specify the proposed coverage limits for each insurance type listed below. FMIPA expects these limits to be commensurate with the scale and risks of a modern industrial rail operation.

- Commercial General Liability (CGL): Protecting against claims for bodily injury, property damage, personal and advertising injury, and contractual liability.

- Railroad Protective Liability (RRP): Specifically, to protect FMIPA, GFDC and the Union Pacific Railroad from liabilities arising out of the Concessionaire's work and operations on or near the interchange and throughout the park.

- Workers' Compensation and Employers' Liability (including FELA): Statutory Workers' Compensation coverage as required by the State of Nebraska. The policy must explicitly include coverage for claims arising under the Federal Employers' Liability Act (FELA), which governs railroad employee injuries.

- Automobile Liability**:** Covering all owned, non-owned, and hired vehicles used in the performance of services.

- Pollution Liability**:** Covering cleanup costs (both on-site and off-site) and third-party liability resulting from pollution events arising from the Concessionaire's operations, including spills from railcars or equipment.

- Umbrella/Excess Liability: Providing excess liability coverage over the primary Commercial General Liability, Employers' Liability, and Automobile Liability policies to achieve the required total limit of protection.

General Insurance Provisions:

All proposals must confirm that the Concessionaire's insurance program will adhere to the following standard provisions:

1. Additional Insureds: FMIPA's, its officers, employees, and agents, as well as the Union Pacific Railroad, shall be named as Additional Insureds on all applicable liability policies.

2. Primary and Non-Contributory: The Concessionaire's insurance policies shall be primary and non-contributory with respect to any other insurance available to FMIPA.

3. Waiver of Subrogation: All policies shall contain a waiver of subrogation in favor of FMIPA/GFDC, whereby the insurer waives the right to sue FMIPA/GFDC to recover losses paid on behalf of the Concessionaire.

4. Carrier Rating: All insurance shall be placed with reputable carriers with a current A.M. Best rating of no less than "A- VIII."

5.5.2 Performance Guarantee

To secure the full and faithful performance of all its financial and operational obligations under the Concession Agreement—including meeting operational KPIs and making all required payments to FMIPA (such as revenue sharing and performance deductions)—the Concessionaire shall provide and maintain an Operational Performance Guarantee.

Instrument: This guarantee shall be in the form of an irrevocable, standby Letter of Credit or a Performance and Payment Bond from a surety acceptable to FMIPA.

Amount: Bidders must propose a specific amount for this guarantee. As guidance, FMIPA anticipates this guarantee will be in an amount equivalent to 6-12 months of the Concessionaire's projected annual operating expenses.

Purpose: The guarantee shall be callable by FMIPA in the event of an uncured default by the Concessionaire, failure to pay required performance deductions or revenue-sharing payments, or to remedy other specified material breaches of the agreement. It serves as a ready source of funds to protect FMIPA and the public interest.

5.6 Default and Termination Rights

The Concession Agreement will include a detailed section on events of default and remedies. This will include, but not be limited to:

Termination for Performance Default: FMIPA will retain the right to terminate the agreement for cause in the event of a Persistent Breach, defined as a consistent and material failure to meet critical KPIs below a defined "Default Threshold" for a sustained period. This right is subject to a contractually defined Cure Period, providing the Concessionaire an opportunity to rectify the performance failures before termination proceedings can be initiated.

Termination for Financial Default: Default events will include insolvency, bankruptcy, or failure to make required payments to FMIPA.

Termination for Convenience (FMIPA Right): FMIPA may retain the right to terminate the agreement without cause at its discretion, subject to a pre-negotiated termination payment to the Concessionaire that would make them financially whole for their investment and lost future profits.

5.7 Assignment

The Concessionaire may not assign, sell, or otherwise transfer its rights or obligations under the Concession Agreement to any other entity without the prior, explicit written consent of FMIPA, which shall not be unreasonably withheld. This includes any transfer resulting from a change of control of the Concessionaire's parent company.

5.8 Unforeseen Circumstances & Changes in Law

The agreement will include provisions for addressing unforeseen circumstances, including:

Force Majeure: A clause defining "Acts of God" and other unforeseeable events outside of either party's control, and outlining the process for managing service interruptions and financial obligations during such events.

Changes in Law: A process for negotiating equitable adjustments to the agreement in the event that a new law or regulation is passed that fundamentally and materially alters the economic basis of the project.

5.9 Governing Law

The RFP and the subsequent Concession Agreement shall be governed by and construed in accordance with the laws of the State of Nebraska. All legal proceedings shall take place in the appropriate courts for Fremont, Nebraska.

5.10 Key Personnel

The Concessionaire's management team is critical to the long-term success of this partnership. Certain positions shall be designated as "Key Personnel."

Designation: Bidders must identify their proposed candidates for, at a minimum, the following Key Personnel roles in their proposal: General Manager, Operations Manager, and Safety Manager.

Approval: The individuals proposed for and assigned to these Key Personnel roles are subject to the review and written approval of the FMIPA prior to the commencement of the Concession Term.

Replacement: The Concessionaire shall not remove or reassign any approved Key Personnel without providing the FMIPA with at least thirty (30) days prior written notice. The Concessionaire must submit the name and qualifications of any proposed replacement, who must have equivalent or superior qualifications to the person being replaced. Any replacement is subject to the review and written approval of the FMIPA, which shall not be unreasonably withheld.

Removal for Cause: The FMIPA shall have the right to request, in writing, the removal of any Key Person for reasonable cause, including but not limited to persistent failure to perform their duties or demonstrated conduct that is detrimental to the partnership or the safety of the Fremont Inland Port.

6. RISK AND PERFORMANCE MANAGEMENT (KPIs)

The successful management of the Fremont Inland Port will be governed by a robust Risk and Performance Management framework designed to align incentives, ensure accountability, and guarantee the highest levels of service. The KPIs listed below will form the basis of the performance standards in the final Concession Agreement. In your proposal, you must provide a detailed response to each category.

6.1 Service Reliability KPIs

Your proposal must demonstrate a deep understanding of how operational performance impacts tenant success.

On-Time Placement Performance: Measures the percentage of inbound railcars placed at a tenant's designated spot within an agreed-upon service window. It is the most direct measure of service reliability impacting tenant production schedules. *Your proposal must define this service window (e.g., +/- 2 hours of scheduled time) and propose a performance target.*

On-Time Pull Performance: Measures the percentage of outbound railcars pulled from a tenant's facility within an agreed-upon window after being released. This is critical for preventing demurrage and maintaining site fluidity. *Your proposal must define this service window and propose a performance target.*

Service Order Accuracy: Measures the percentage of switching orders completed correctly on the first attempt without error (e.g., wrong car, wrong spot). This KPI reflects operational discipline and efficiency. *Your proposal must propose a performance target and describe how errors are tracked and rectified.*

Average Car Dwell Time: Measures the average time a railcar spends within the park, from interchange arrival to interchange departure. It is a key indicator of overall asset utilization and yard efficiency. *Your proposal should include a target average dwell time in hours.*

6.2 Safety & Compliance KPIs

A deep-rooted, world-class safety culture is a non-negotiable prerequisite for this partnership.

Total Reportable Injury Frequency Rate (TRIFR): A critical measure of workforce safety outcomes. Your proposal must state your firm's corporate TRIFR for the past three years and propose a target for this project.
Number of FRA Reportable Incidents & Derailments: FMIPA's goal is a "zero-incident" culture. The proposed performance target for both FRA-reportable incidents and all derailments (regardless of severity) on park-controlled track must be zero.

Safety Audit & Compliance Score: This demonstrates a commitment to day-to-day operational discipline. Your proposal must detail the scope, frequency, and nature (e.g., internal vs. third-party) of your safety audit program and propose a target compliance score.

Near-Miss Reporting Program: A healthy near-miss reporting culture is the hallmark of a mature safety program. Your proposal must describe your program for encouraging employee reporting and explain how this data is analyzed to implement concrete preventative actions.

FMIPA shall be granted access to operational and safety dashboards related to this operation.

6.3 Performance Regime and Financial Consequences

The KPIs are not merely a reporting exercise; they will have direct financial consequences. The final Concession Agreement will contain a Performance Regime that links operational performance to compensation. For each key KPI, the agreement will define a "Target Level," a lower "Performance Threshold," and a critically low "Default Threshold."

Performance Deductions: Your proposal must acknowledge and accept that if performance for a given KPI falls below its Performance Threshold for a measurement period (e.g., a quarter), it will trigger a specific, pre-agreed financial Performance Deduction. This functions as a service credit from the Concessionaire to FMIPA. Your proposal must include a preliminary schedule of proposed Performance Deductions. For each key KPI (e.g., On-Time Placement), propose a dollar amount that would be deducted for each percentage point of underperformance below the threshold for a given quarter.

Link to Termination: Sustained performance below the Default Threshold will constitute a Persistent Breach and will trigger the Default and Termination rights outlined in Section 5.6.

7. EVALUATION CRITERIA

Strength and Viability of the Financial Partnership Model (30%)

This is the most heavily weighted criterion. GFDC/FMIPA will critically assess the credibility, creativity, and realism of the proposed financial plan. This includes a detailed review of the proposed financing structure, sources of capital, level of private equity investment, and the commercial pro-forma's assumptions. The attractiveness, clarity, and sustainability of the proposed revenue-sharing model for GFDC/FMIPA will be a primary consideration.

Flexibility and Value of Alternate Proposal (20%)

GFDC/FMIPA will specifically evaluate the *delta* between the Base and Alternate proposals. The bidder who demonstrates the most significant and creative value enhancement for GFDC/FMIPA in their Alternate Proposal (e.g., through a substantially improved revenue share, a shorter requested concession term, or more competitive tenant rates) will score highest on this criterion. This measures the bidder's flexibility and willingness to create value in a true partnership context.

Demonstrated Market Commitment & Financial Risk Reduction (5%)

This criterion evaluates the bidder's ability to reduce initial market risk and accelerate revenue generation for the project. Proposals that include a committed commercial opportunity backed by verifiable evidence (such as an LOI), as detailed in Section 4.3.1, will score highest on this criterion. The evaluation will focus on the credibility of the opportunity, the projected volume and revenue, and the overall impact on the project's financial stability from day one. A strong proposal in this area will demonstrate a clear path to immediate, sustainable revenue, significantly de-risking the investment for all partners.

Demonstrated Corporate Experience in P3 and Rail Development (10%)

The evaluation will prioritize firms with a proven, successful track record in all facets of this project: financing, developing, and operating industrial rail infrastructure, particularly within a Public-Private Partnership (P3) or concession agreement framework. Bidders must provide specific project examples that demonstrate their capabilities. The qualifications and direct, relevant experience of the proposed key personnel will be heavily weighted.

Commitment to Safety and Performance (20%)

A deep-rooted culture of safety and accountability is a non-negotiable prerequisite. This evaluation will consider the bidder's historical safety record (TRIFR, incident rates), the proactive nature of their proposed corporate safety programs, and the quality and thoroughness of their response to the KPI and Performance Regime requirements outlined in Section 6.

Quality of the Operational Plan (10%)

This criterion focuses exclusively on the bidder's technical ability to run a safe, efficient, and reliable railroad. The evaluation will assess the proposed plan for staffing, locomotive power and equipment, asset maintenance, day-to-day service design, and management of the Class I interchange. A high-scoring proposal will demonstrate a deep understanding of railroad operating best practices that maximize velocity, ensure tenant satisfaction, and create a world-class safety culture.

Quality of the Marketing Partnership Plan (5%)

This criterion, distinct from operations, focuses on the bidder's commercial acumen and commitment to helping grow the park. The evaluation will assess the specificity and credibility of the bidder's plan to partner with GFDC in the tenant recruitment process. High-scoring proposals will detail the specific resources (e.g., personnel, analytical tools) they will commit and the specific deliverables (e.g., competitive transport analyses) they will provide to support GFDC’s marketing efforts. Please include specific examples of other parks/ports you have grown.

8. RFP PROCESS AND TIMELINE

8.1 Official Contact

All inquiries in writing to Megan Skiles, President & CEO at megan.skiles@fremontecodev.org and Aaron Brown, Burns & McDonnell, at akbrown@burnsmcd.com.

8.2 RFP Timeline

Key dates include a Mandatory Pre-Proposal Conference and Site Visit (April 28, 2026), Deadline for Questions (May 31, 2026), Proposal Due Date (June 30, 2026), Post-Proposal Interview (July 21-23, 2026).

8.3 Right to Reject Proposals

The GFDC reserves the right to reject any or all proposals.

9. SUBMISSION INSTRUCTIONS

9.1 Submission Deadline:

No later than 5:00 PM CST on June 30, 2026.

9.2 Format:

One (1) digital PDF and one (1) bound physical copy.

9.3 Submission Methods:

Digital copy via email to the official contact; physical copy mailed to 1005 E 23rd St, Ste #2, Fremont, NE 68025.

Note: The Fremont Inland Port Master Plan, Site Readiness Report, Market Demand Survey Report, and Initial Conceptual Layout (DEVCON) are included as addenda to this Request for Proposal.

ADDENDA

ADDENDUM 1
FREMONT INLAND PORT MASTER PLAN

NORTH

FREMONT MASTERPLAN OPTION 4

0 500' 1000'
SCALE IN FEET

no.	date	by	ckd	description

BURNS McDONNELL

date | detailed
designed | checked

FREMONT MASTER PLAN
OPTION 4

project | contract
drawing | rev.
sheet | of | sheets
file 156760_Fremont_MP_OPT_4.dwg

ADDENDUM 2
SITE READINESS REPORT

Port of Fremont
Site Readiness Report

CITY OF
FREMONT
NEBRASKA

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01 Site Readiness Report

FREMONT-DODGE INLAND PORT DESKTOP DUE DILIGENCE STUDY

OVERVIEW

Burns & McDonnell (BMcD) was hired by Greater Fremont Development Council (GFDC) to perform a Desktop Due Diligence study to analyze unique sites for the future development of industrial and manufacturing facilities. The study provides a high-level identification and analysis of site, environmental, and utility factors.

GENERAL SITE DATA

- Size of the subject property is 1,704 acres total with 1,669 acres of buildable area.
- 41°25'37.83"N, 96°26'4.98"W
- Parcel ID's (32 total)
    - 270127904
    - 270127953
    - 270127967
    - 270128037
    - 270128205
    - 270128107
    - 270137827
    - 270140238
    - 270128191
    - 270128219
    - 270128030
    - 270127919
    - 270127946
    - 270127960
    - 270128198
    - 270128212
    - 270128296
    - 270139553
    - 270136461
    - 270128149
    - 270139636
    - 270128310
    - 270127925
    - 270127932
    - 270128023
    - 270128163
    - 270138019
    - 270127890
    - 270127974
    - 270128030
    - 270128142
    - 270128121
- Dodge County, 2021 population was 37,103 (source: US Census Bureau)
- Neighboring Counties (source: US Census Bureau):
    - Saunders County, 2021 population was 22,787.
    - Washington County, 2021 population was 20,969.
    - Burt County, 2021 population was 6,709.
    - Cuming County, 2021 population was 8,984.
    - Colfax County, 2021 population was 10,498.
    - Butler County, 2021 population is 8,444.
- Fremont, NE (city) population is 27,373 (source: United States Census Bureau, July 2021).
- The City of Fremont, NE, government structure is described in Sec. 2 of the City of Fremont Code of Ordinances: "The Mayor shall be elected at large to serve a four (4) year term of office. Two (2) City Council Members shall be elected for a four (4) year term from each ward. One (1) Council Member from each ward shall be elected at each election, so that terms are staggered. They shall be electors of the City and residents of the ward from which they were elected."

LAND USE AND ZONING

- CURRENT LAND USE
  - Agricultural & Rural Residential
- FUTURE LAND USE
  - Port Authority
- ZONING
  - Current Zoning: Agriculture
  - Future Zoning: Port Authority

The City of Fremont is currently in the process of rezoning the land to a Port Authority designation and annexation of the site will occur with development of the site. For specifics on the City of Fremont's rezoning procedure, refer to Sec. 11-314 of the City of Fremont Code of Ordinances "Standardized Development Approval Procedures".

SITE TOPOGRAPHY

- Per the United States Geologic Survey (USGS) Contour database, the site features slopes of approximately 0-1% with site elevations ranging from 1170'-1159'. Overall, the steeper slopes lead into existing drainage channels.
- Generally, the site drains west to east, either draining off site to the east of the boundary or to the creek that runs through the northeastern corner of the site.

A topographical and ALTA survey of the subject property is recommended to assist the site's overall site readiness. This would include mapping easements, right-of-ways, parcel boundaries, and other title information pertinent to the subject property. For a property of this size, a drone or aerial survey prior to vegetation growth in the spring is recommended, supplemented with additional ground survey control as needed.

SOILS & GEOLOGIC DATA

- No formal Geotechnical Report has been performed on this site.
- The United States department of Agriculture (USDA) Natural Resources Conservation Service (NRCS) Web Soil Survey (WSS) was used to review the soils on site at a high-level.
  - The soil groups identified on this site via the WSS are composed of mostly Gibbon silty clay loam (34.0%), Gibbon-Wann complex (24.5%), Luton silty clay (12%), Janude loam (9.9%), Wann loam (7.3%) and Gibbon loam (5.3%).
    - Gibbon silty clay loam, and a majority of the soils shown on site, have a hydrological soil group classification of C. This indicates that the site overall has a slow infiltration rate when thoroughly wet which gives it a slow rate of water transmission.
    - Estimated depth to the water table is approximately 2-4 ft. below ground surface level.
    - Estimated depth to bedrock is 1-6 ft. below ground surface level.

A preliminary geotechnical investigation is recommended for this site to provide information about the exact soil types, depths to bedrock, soil bearing capacities, and preliminary recommendations regarding foundations and pavement sections.

TRANSPORTATION INFRASTRUCTURE

- ROADWAYS
  - Multiple roadways of varying classifications serve the subject property.
    - County Road W. is a gravel road that runs east/west through the northern portion of the site.
    - S County Road 26 is a gravel road that runs north/south along the eastern side of the subject property.
    - Old Hwy. 8 is a two-lane, concrete road with no shoulders that runs east/west along the southern boundary of the subject property.
  - State Highway-275 (Hwy. 275) is a four-lane, concrete, divided highway with paved shoulders that runs primarily north/south and boarders the subject property along its western boundary. The highway has two exits that serve the site, an exit that connects to County Road W. and an exit that connects to Old Hwy. 8. Both exits can get access to the site.

The existing roadway infrastructure is primarily made up of county gravel roads that would need to be upgraded to support an industrial end user.

- RAILROAD
  - The nearest rail line is the east/west Union Pacific Blair Subdivision main line which runs along the northern boundary of the subject property. Two parallel main lines are present in this area.
  - The nearest rail yard is in Fremont, around a mile west of the site.

AIR SERVICE

- COMMERCIAL AIRPORTS
  - Eppley Airfield (OMA)
    - Located approximately 33 miles from the site.

- MUNICIPAL AIR SERVICE
  - Fremont Municipal Airport (FET)
    - Located approximately 6.6 miles from the site.

Based on the subject property location in relation to the noted airports, an FAA study or FAA airspace restrictions are not anticipated for buildings under 100'. An FAA 7460-1 application may still be required for construction depending on the building and crane heights.

FLOODPLAIN

- The Flood Insurance Rate Map (FIRM) FEMA Floodplain Maps have identified flood zones on the property.
- FEMA FIRM Panel number 310069
- According to the FEMA FIRM maps, the 500-year flood plain (0.2% Annual Chance Flood Hazard) cover a majority of the site with a small portion in by the creek in the northeastern corner being apart of the 100-year flood plain (1% Annual Chance Flood Hazard). The presence of the 100-year flood plain on the northeastern corner is easy to

mitigate by avoiding the area. The presence of the 500-year floodplain on the rest of the site will require more strategic master planning and permitting to make the land developable.

WETLANDS

EXISTING WETLANDS

- The National Wetland Inventory indicated two freshwater emergent and two riverine wetland features within the subject property. These features are located primarily within roadside ditches, field edges, and manmade drainages that intersect the subject property.
- The National Hydrography Dataset indicated three stream features, including Rawhide Creek (Old Channel), within the subject property. These features are located within manmade drainages that intersect the subject property.
    - *Wetland Delineation Reports* were completed within the subject property in June 2023 by Burns & McDonnell. The "Survey Area", or the area subject to investigation in these reports, is smaller in size than the subject property. The Survey Area is located southwest of the intersection of South County Road 26 and Morningside Road, just outside of the city limits of Fremont, Nebraska. The Survey Area includes 17 parcels (270127904, 270127904, 270127925, 270127925, 270128023, 270128023, 270128030, 270128044, 270128044, 270128191, 270128191, 270128191, 270128191, 270128198, 270128198, 270128198, 270128198).
    - The *Wetland Delineation Reports* documented three wetlands totaling 2.80 acres and two stream channels totaling 2,957 linear feet within the Survey Area. There is potential for other wetlands and stream features to be present within the subject property.
    - The findings from the delineation are considered valid for five years. If wetland and/or stream impacts are anticipated outside of the Survey Area, it is recommended that a delineation be performed to determine the presence and boundaries of these wetlands, streams, and other water bodies. This will be necessary to better understand all jurisdictional and non-jurisdictional wetlands and if wetland impacts necessitate permitting.
    - See Appendix 3 for Wetland Delineation Map.

PERMITTING

- If proposed project activities have the potential to impact Waters of the U.S., coordination with the United States Army Corps of Engineers (USACE) Omaha Regulatory District Central Unit Office would be necessary to obtain an Approved Jurisdictional Determination (AJD) and/or permit from the USACE prior to proceeding with construction activities. Clean Water Act (CWA) - Section 404 Dredge and Fill Permit requires coordination with the Nebraska Game and Parks Commission. Permit mechanisms employed would vary depending on the nature and extent of impacts as follows:
    - Impacts below 1/10 of an acre may be automatically covered under a Nationwide Permit (NWP) with no requirement to notify the USACE dependent upon the nature of impact.
    - Impacts between 1/10 and 1/2 acre that qualify for coverage under an NWP would require a Pre-Construction Notification (PCN) and would typically be authorized in 90 days or less.

- Impacts greater than 1/2 acre or impacts ineligible for coverage under a NWP would require an individual Permit, with an anticipated review period of 12 months or more.
- A Clean Water Act (CWA) - Section 401 Water Quality Certification with the Nebraska Department of Environment and Energy and the USACE would be required if impacts to wetland and waterbody features cannot be avoided. This certification is required to ensure the project complies with water quality standards issued in Title 117, Nebraska Administrative Code.

MITIGATION

Compensatory mitigation is typically required for permanent impacts to Waters of the U.S. exceeding 1/10 acre in cases where a PCN is required. The Nebraska Stream Mitigation Procedure Guidance would be utilized to mitigate stream impacts. The final determination of mitigation requirements is at the discretion of the USACE.

ENVIRONMENTAL INVESTIGATIONS

Environmental Data Resources Inc. (EDR) provided a report of environmental agency listings contaminating U.S. Environmental Protection Agency (USEPA), State, and tribal database information in accordance with ASTM-defined search distances. EDR's Radius Map Report with GeoCheck lists the Federal, State, and tribal databases searched, a description of the databases, and the most recent release date of each database.

EDR identified three sites on or near the Subject Property in release related databases. All three sites were identified in the leaking underground storage tank database:

- Carson Day, Rural Route 3, reportedly on the Subject Property boundary,
- Fremont Warehouse & Garage, 3000 E 1st St, approximately 0.43 miles upgradient, and
- Garage Warehouse, 3000 East 1st St, approximately 0.43 miles upgradient.

The Carson Day LUST site is reportedly located on the southern Subject Property boundary. The LUST incident was reported in December 1989 involving diesel fuel. The incident was issued a No Further Action (NFA) status. Because of the location of the site relative to the Subject Property, as reported by EDR, the Nebraska Department of Environment and Energy online public records were searched for additional information. Documents available for the site show that the site is actually located internal to the Subject Property on Morningside Road, which crosses the northern half of the Subject Property. The NDEE information states that the incident file is related to a permitted tank removal, which included a site assessment. No holes or other signs of leakage were observed during the tank removal. Several samples were collected and appear to have only had their head space analyzed as well as notes made on any discoloration or odor present. A "slight fuel odor" was noted for two of the samples. All three samples had low level detections with a photoionization detector, ranging from 0.2 to 0.7 parts per million). NDEE issued an NFA for the site after receipt of the site assessment report. Based on the information available from NDEE, the likelihood of contamination at the Subject Property from this LUST incident is low.

The Fremont Warehouse & Garage LUST site and the Garage Warehouse LUST site are reported at the same address; however, they appear to be for different LUST incidents. The Fremont Warehouse & Garage LUST incident was reported in December 1989 involving gasoline. The Garage Warehouse LUST incident was reported in June 1994 involving gasoline and diesel fuels. Both incidents have been issued No Further Action statuses. Based on the status of these incidents and their distance from the Subject Property, these LUST incidents are unlikely to have impacted the Subject Property.

EDR reported 21 orphan[1] sites as potentially being within the ASTM-defined search distances of the Subject Property. Fourteen of these sites are identified in release related databases. Using online mapping resources, Burns & McDonnell determined that one of these orphan sites is within the ASTM-defined search distance of the Subject Property. The Fremont Waste Water Treatment Plant, which reported a LUST incident in 1991 is adjacent to the east of and downgradient from the Subject Property. The LUST incident was issued an NFA status. Based on the status and the downgradient location of this site, this site is unlikely to have impacted the Subject Property.

EDR identified 39 water wells with the Subject Property boundary. There were no oil and gas wells identified on the site.

The National Pipeline Mapping System (NPMS) Public Viewer, which is a United States Department of Transportation (USDOT) Pipeline and Hazardous Materials Safety Administration (PHMSA) resource, was checked for pipelines in the vicinity of the Subject Property. An anhydrous ammonia pipeline, operated by Nustar Pipeline Operating Partnership was identified crossing the southeastern portion of the Subject Property in Section 28.

Note that this review was limited to a review of information available through EDR's database search report, supplemental information available through NDEE's online public records search, and the NPMS Public Viewer. Based on the information reviewed, the likelihood of contamination at the Subject Property is low.

Note that although certain aspects of the ASTM International (ASTM) E1527 Standard Practice for Phase I Environmental Site Assessments (Phase I ESA) are included in this scope, the results of this review do not fully meet the requirements of the ASTM Standard Practice E1527 or the All Appropriate Inquiries (AAI) regulation as codified at 40 Code of Federal Regulations (CFR) 312. A Phase I ESA is recommended prior to property acquisition if liability protection is desired.

Previous Phase I Environmental Site Assessments

Burns & McDonnell conducted Phase I ESAs for three distinct areas with the Subject Property boundary, which were issued in June 2023. There were no Recognized Environmental Conditions identified for any of the three areas. The long history of agricultural use of the areas was identified as a Potential Environmental Concern for all three areas.

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Supporting text.

[1] EDR's Area/Corridor Report also shows USEPA, State and tribal regulated sites within the search area and other regulated sites that are potentially within the search area but that are considered unplottable by EDR due to insufficient address or locator information. These unplottable sites are called "Orphan Sites" in this report.

AIR PERMITTING

- ATTAINMENT STATUS: This site is located in Dodge County, which is currently in attainment for all criteria pollutants, meaning criteria pollutant concentrations have attained designated National Ambient Air Quality Standards (NAAQS). This also indicates potentially less stringent thresholds for air permitting than an area designated as nonattainment for a pollutant.
- PERMITTING PROCESS: Emission sources or activities that release pollutants into the atmosphere must be evaluated to determine whether authorization is needed to construct and operate. Regulated pollutants include nitrogen oxides (NOx), volatile organic compounds (VOC), sulfur dioxide (SO2), fine particulate matter less than 10 and 2.5 microns (PM10 and PM2.5), carbon monoxide (CO), and lead (Pb). The Nebraska Department of Environment and Energy (NDEE) regulates these criteria air pollutants and hazardous air pollutants (HAPs).
  - There are two types of construction permits: state construction permits, and federal construction permits (New Source Review (NSR) and Prevention of Signification Deteriorations (PSD) permits).[2] Facilities are required to obtain a construction permit before they construct, reconstruct, or modify any stationary source or emission unit where there is a net increase in the potential to emit (PTE) pollutants that is equal to or above certain thresholds.[3] Sources that meet the criteria adopted by NDEE (40 CFR §52.21) will be required to obtain a PSD or NSR construction permit depending on if the source is located in an attainment or nonattainment area.[4] Sources that meet certain criteria may initiate construction before issuance of the construction permit provided the NDEE has received a complete application for the construction permit, and the source submitted the pre-constitution notification to the NDEE at least 30 working days before initiating construction.[5]
  - There are two types of operating permits: federal major source (Class I aka Title V) and state minor source (Class II).[6] An operating permit must be applied for within 12 months of the source becoming operational or otherwise subject to the requirement to obtain an operating permit,[7,8] unless the source meets specific exemption criteria.[9,10] The PTE from the facility will determine which permit is applicable. A Class I (Title V) operating permit has a PTE greater than 100 tons per year (tpy) of criteria air pollutants, 10 tpy of any single HAP or 25 tpy of a combination of HAPs, or 5 tpy of lead.[11] If the actual emissions are greater than 50 tpy of criteria air pollutants, 5 tpy or more of any single HAP or 12.5 tpy of a combination of HAPs, or 2.5 tpy or more of lead, then a Class II permit applies.[12] There are two classifications for minor sources: minor and

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[2] Nebraska Administrative Code (NAC) Title 129, Chapter 3
[3] NAC, Title 129, Chapter 3 001.03
[4] NAC Title 129, Chapter 4 001
[5] NAC Title 129, Chapter 3 001.01
[6] NAC Title 129, Chapter 6
[7] NAC Title 129, Chapter 6 002.01
[8] 40 CFR §70.5(a)(1)
[9] NAC Title 129, Chapter 6 001.04
[10] 40 CFR §70.3(b)(4)
[11] 40 CFR Part §70.2 – Major Source Definition
[12] NAC Title 129, Chapter 6 001.03A1-A7

synthetic minor. A synthetic minor source may be applied for if a source is required to apply for a Class I operating permit due to PTE, but practically enforceable limits are in place to keep a source's actual emissions below major source levels and within the Class II thresholds.[13] If a source has a PTE that exceeds Class I permit thresholds, but its actual emissions are below the Class II thresholds, it can apply for the "Low Emitter Rule" if it follows certain conditions to ensure it is a low emitter.[7]

- PERMITTING TIMELINE: Permit requirements and associated application and annual costs for compliance increase as the level of permitting required increases, as described above. Based on the typical state timelines, the timelines for construction and operating permits are similar. Average application preparation, including air dispersion modeling, if required, may be completed in three to five months for natural minor and synthetic minor permits, with up to six months required to prepare an application for a PSD/NSR or Title V permit. The average timing for agency permit review for construction and operating permits, completing air dispersion modeling (if required), the public notice period, and final approval is estimated at four to six months for natural minor and synthetic minor permits and six to twelve months for PSD/NSR permits. NDEE strongly encourages project planning and pre-application meetings to help with early communication to streamline the permitting process.[14]
- AIR DISPERSION MODELING REQUIRED: PSD/NSR permits that trigger major source thresholds will typically require air dispersion modeling. In most cases, the modeling will likely be required to evaluate the project's potential impacts and determine if pollutant concentrations exceed the NAAQS. Air modeling can include relatively simple screening modeling (e.g., SCREEN3) up to complex air dispersion modeling (e.g., AERMOD). AERMOD is more likely to be necessary for sites with multiple sources and higher emission rates. The time and cost necessary to complete air modeling increases with the complexity and number of emission sources.
- ADDITIONAL CONSIDERATIONS: When developing site plans for proposed emissions sources, it is recommended to consider the location of surrounding off-property structures (e.g., residences, schools, businesses, churches, recreational areas, etc.). The distance to off-property structures and emission characteristics could require adding emission controls or limiting operations to meet applicable regulations or emission standards. Once the equipment to be constructed is known, the potential to emit can be calculated and the appropriate permit(s) identified.

THREATENEND & ENDANGERED SPECIES

- The U.S. Fish and Wildlife Service's (USFWS) Information for Planning and Consultation (IPaC) system, run in June 2023, was used to identify potential threatened and endangered species that may be present on the site. The species listed as having potential to occur within the site include the piping plover (*Scaphirhynchus albus*) [Threatened], pallid sturgeon (*Charadrius melodus*) [Endangered], and monarch butterfly (*Danaus plexippus*) [Candidate Species]. In addition to these species, the Nebraska Game and Parks Commission's Threatened and Endangered List of Species by County also lists the interior least tern (*Sternula antillarum athalassos*) [Endangered], lake sturgeon (*Acipenser fulvescens*) [Threatened], northern long-eared

[13] NAC Title 129, Chapter 6 001.02
[14] http://dee.ne.gov/NDEQProg.nsf/OnWeb/APP

bat (*Myotis septentrionalis*) [Endangered], sturgeon chub (*Macrhybopsis gelida*) [Endangered], and western massasauga (*Sistrurus tergeminus*) [Threatened].
    - See Appendix 3 for USFWS IPaC and Nebraska Game and Park's Threatened and Endangered List of Species by County documents.
- An on-site assessment was conducted to determine if suitable habitat for these protected species is likely to be present within the Site. The Site is largely composed of agricultural, rural residential, and riparian areas. The water features, wooded areas, and open areas of the Site have been significantly disturbed and/or altered and are unlikely to provide suitable habitat for the above-listed species. It is recommended that correspondence be initiated with USFWS to verify these determinations. In addition, coordination with the Nebraska Game and Parks through their Conservation and Environmental Review Tool (CERT) is recommended to verify the potential for state-listed protected species to occur within the Site.
- Best Management Practices should be implemented during construction to avoid impacts to potential habitat for the above-listed species. Additionally, coordination with the USFWS may be required for any potential impacts to the Northern Long-Eared Bat or Tricolor Bat because of tree clearing; seasonal tree clearing restrictions may be required.

PERMITTING PROCESS

- Correspondence with the state agency to determine potential impacts to threatened and endangered species is recommended. If listed species or rare communities are determined to have the potential to occur or are encountered during the planning or construction phases, additional studies and/or mitigation may be required. If Project designs change or federal permitting is required, more coordination may be necessary to determine potential impacts to threatened and endangered species.
- State and federal threatened and endangered species coordination is recommended prior to initiating clearing/construction activities on site.

CULTURAL RESOURCES

EXISTING RESOURCES

- The review of the Nebraska State Archeology Office (SAO) Site File identified no previously recorded archeological sites within the subject property.
- A review of the National Register of Historic Places (NRHP) identified no listed properties within the subject property.
- A review of the Nebraska Historic Structure Inventory identified one property in the subject property that has been inventoried by SAO during county-level surveys. This property was not evaluated by the Nebraska State Historic Preservation Office (SHPO) for NRHP eligibility and has been inventoried as More Information Needed. This property is located at 4877 Morningside Road.
- One previous cultural resources investigation has been conducted within the subject property. This investigation surveyed County Rd 25 which runs north to south along the western edge of the subject property.

PERMITTING

- Compliance with Section 106 of the National Historic Preservation Act is triggered through federal permitting or funding. Consultation with the SHPO will be required, as well as the development of an area of potential effects (APE) for archeological investigation and a broader Non-Physical (visual) APE for historic-age architectural investigation. Archeological resources and historic-age architectural resources within the APE would be identified and evaluated to determine eligibility for inclusion in the NRHP.

ADDITIONAL CONSIDERATIONS

- The lack of previously recorded archeological resources within the subject property is likely a result of the small scope of previous investigations in the area of the subject property. Furthermore, the subject property is located on the uplands between the Platte River approximately 2 miles to the southwest and the Elkhorn River approximately 3 miles to the northeast. This landscape location is associated with a higher probability of prehistoric archeological sites. For these reasons, it is the recommendation of Burns & McDonnell that an archeological resource assessment field survey be undertaken for the APE. Any newly identified resources would be evaluated for integrity and significance and to provide NRHP eligibility recommendations and an assessment of potential project effects to any recommended NRHP-eligible resources.
- Burns & McDonnell recommends that a historian conduct field survey to photo-document the historic-age resources (45 years of age or older) associated with each of the four previously inventoried properties within the potential APE and Non-Physical APE. The resources would be evaluated for integrity and significance, to demonstrate the presence or absence of a potential historic district, and to provide NRHP eligibility recommendations and an assessment of potential project effects to any recommended NRHP-eligible resources.

ELECTRIC POWER

- The site is currently served by electric power from the City of Fremont Department of Utilities with a 3-phase power line that runs along the east side of County Road 26 which can currently serve up to 2 MW of power.
- To reach an assumed site demand of 50 MW, an approximate 19-mile transmission line extension would need to be built out to serve the site.
    - A project's system configuration and Southwest Power Pool (SPP) study is recommended to be performed to determine estimated costs and specific upgrades needed to meet the assumed site demand of 50 MW.
    - It is anticipated that the upgrades and extensions required will take approximately 60 months.
- At this time, there is no redundant power service for the site.
- The nearest substation to the subject property is 1-mile to the northwest of the site.

NATURAL GAS

- The site is within the City of Fremont Department of Utilities service area for natural gas coverage but is not currently being served.

- There is currently a 6” natural gas line on the west side of Highway 275 that can handle very small loads, but the line would need to be upgraded and extended to supply a large load from an industrial user on the subject property.
- At this time, there is no redundant natural gas service for the site.

WATER

- The site is within the City of Fremont Department of Utilities service area for water coverage but is not currently being served.
- There is a non-treated water main that runs along Highway 275 and a 24” treated water line just west of Highway 275.
- To get the site served by treated water, the two options would be to either extend the 24” treated water line from the west side of Highway 275 to serve the site or the non-treated water line along Highway 275 could be treated at a proposed treatment facility.
- At this time, there is no redundant water service for the site.

SANITARY SEWER

- The site is currently served by sanitary sewer from the City of Fremont Department of Utilities with a 20” industrial forced main line that runs on a partial section line south of County Road W.
- The site boarders a wastewater treatment plant to the east which includes industrial anaerobic digesters. The 20” industrial forced main running through the site connects to this treatment plant.
- There is capacity on the industrial forced main running through the site but would require city approval prior to connection.
- At this time, there is no redundant sanitary sewer service for the site.

FIBER

- The site is within the Great Plains Communications service area for fiber coverage but is not currently being served.
- Providers in the Fremont area include Great Plains Communication, Century Link/Lumen, Cox, Spectrum, Allo, and American Broadband. The city is currently investigating what coverage would be the most cost effective to extend and serve the site.
- At this time, there is no redundant fiber service for the site.

EMERGENCY SERVICES

- FIRE PROTECTION
    - Fremont Rural Fire Station
        - 110 Boulevard St. Fremont, NE 68025
        - Distance to site: approximately 4.8 miles.
    - Fremont Fire Department
        - 415 W 16th St., Fremont, NE 68025
        - Distance to site: approximately 5.0 miles

- LAW ENFORCEMENT
    - Fremont Police Department

- 725 N Park Ave., Fremont, NO 68025
- Distance to site: approximately 4.7 miles

02 Site Maps

CITY OF FREMONT NEBRASKA

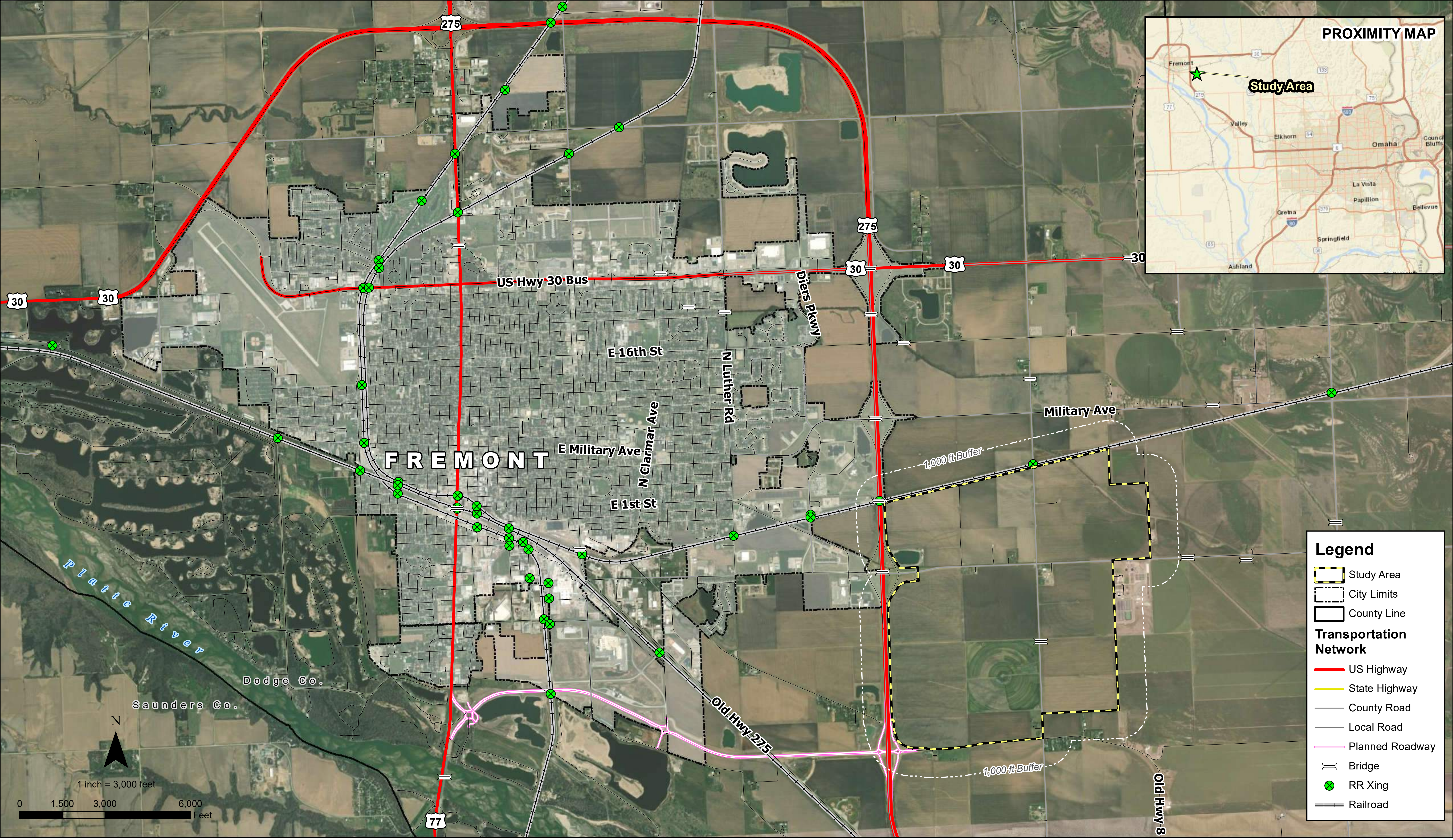
BURNS & McDONNELL

Site Map

Fremont-Dodge Inland Port

Railroad Access Map

Fremont-Dodge Inland Port

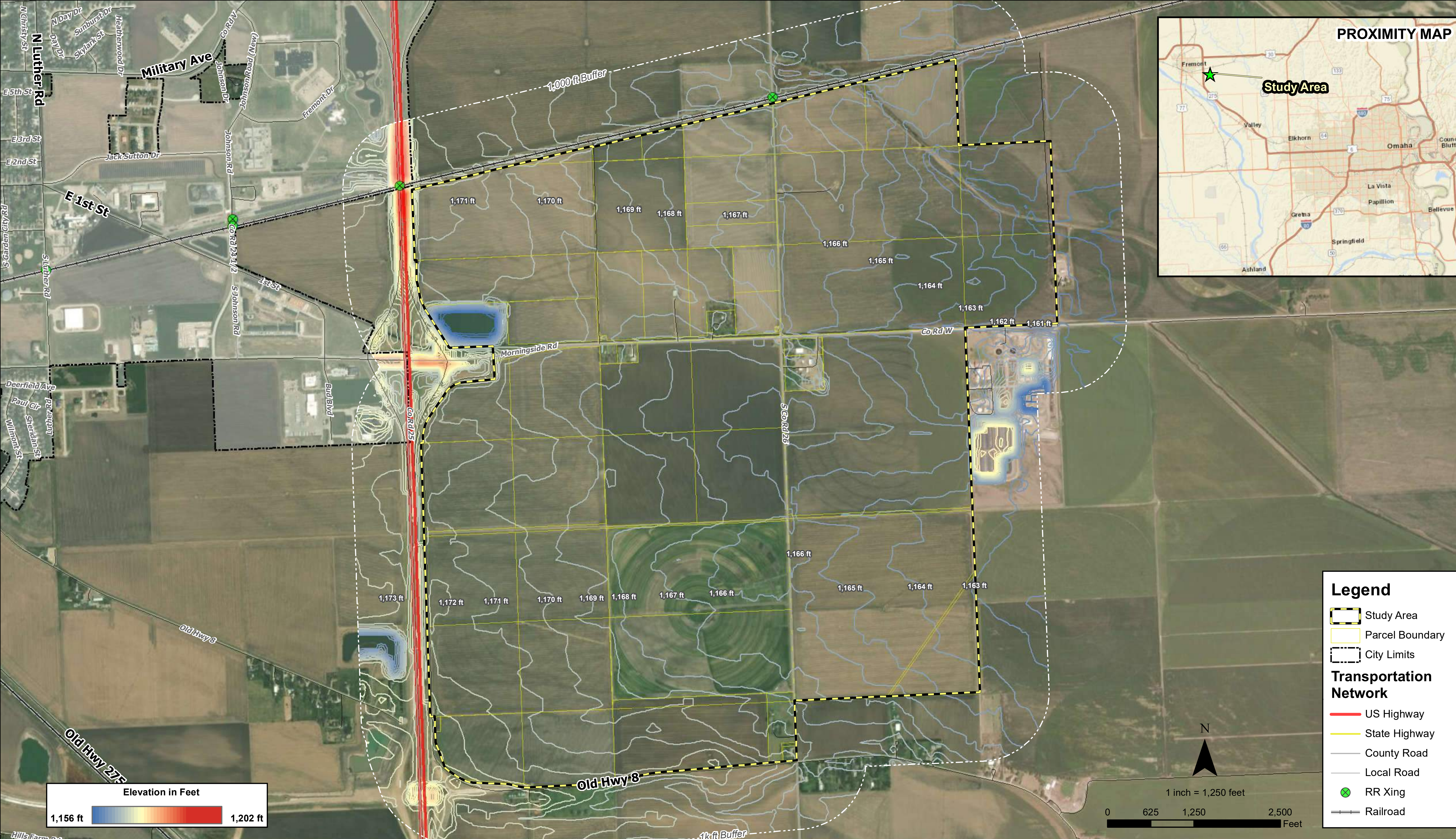


CITY OF FREMONT NEBRASKA

BURNS & McDONNELL

Local Transportation Network Map

Fremont-Dodge Inland Port

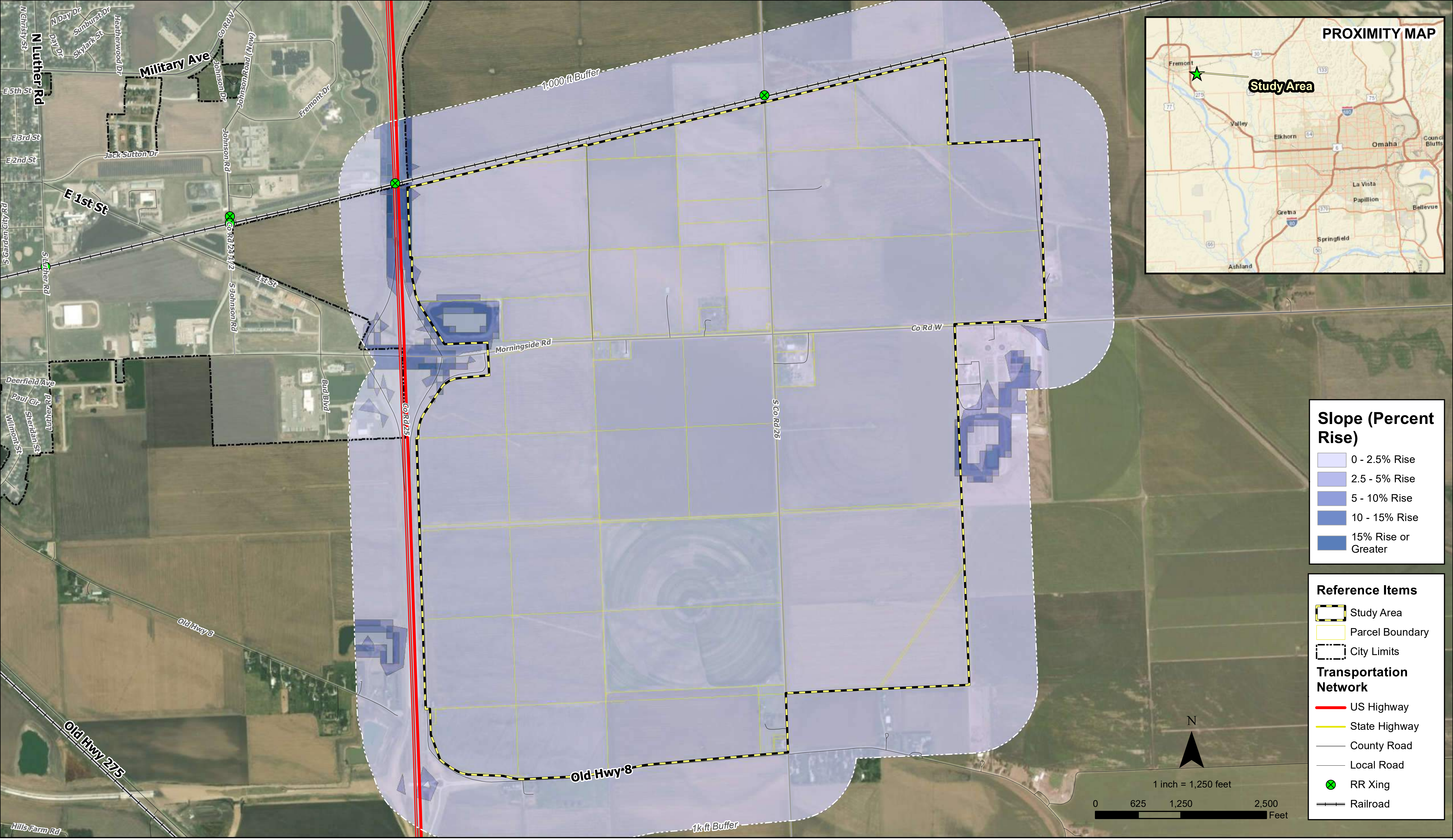


CITY OF FREMONT NEBRASKA

BURNS McDONNELL

Elevation Contour Map
1 Ft. Contours

Fremont-Dodge Inland Port

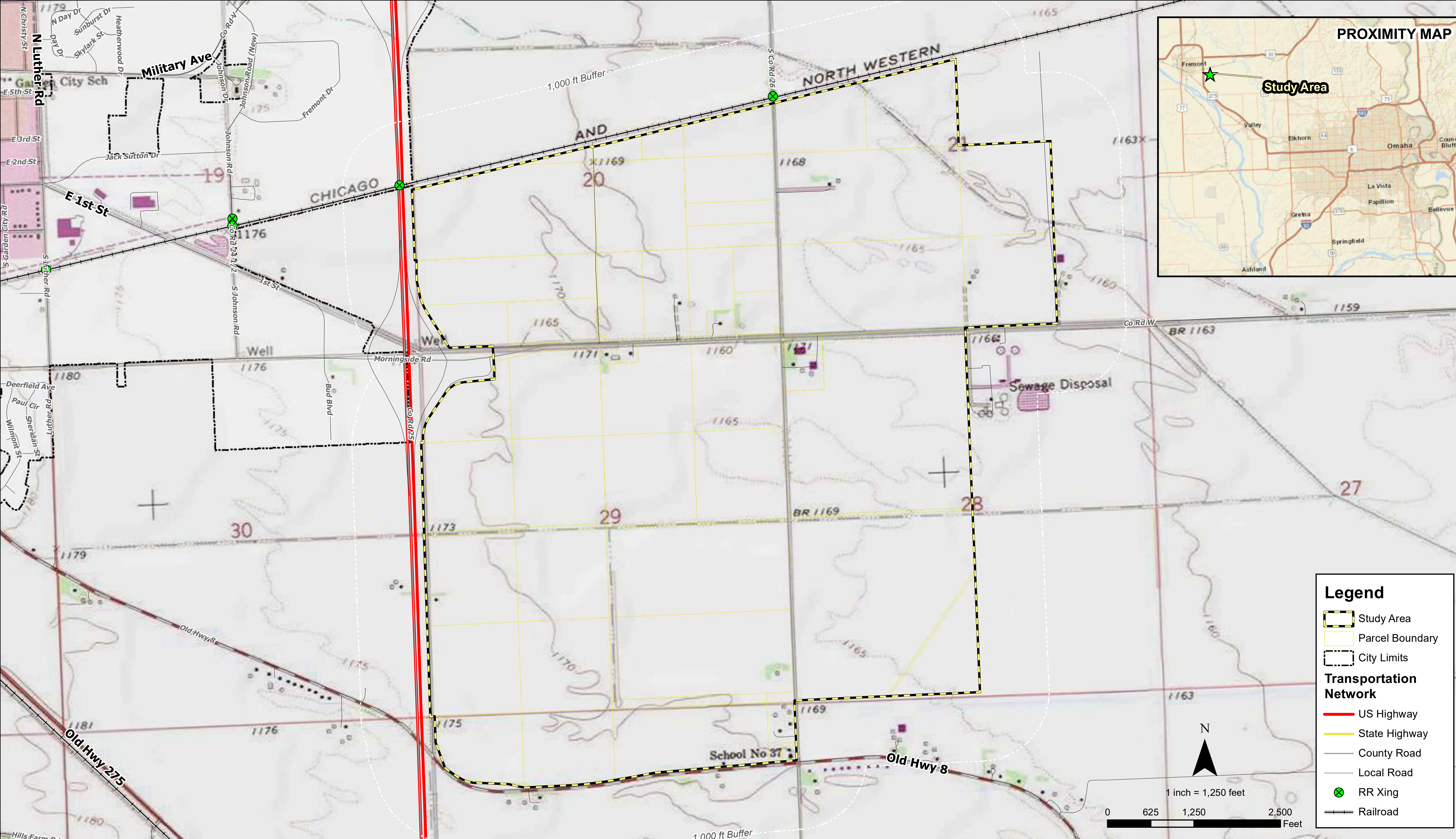


CITY OF FREMONT NEBRASKA

BURNS & McDONNELL

Slope Map

Fremont-Dodge Inland Port

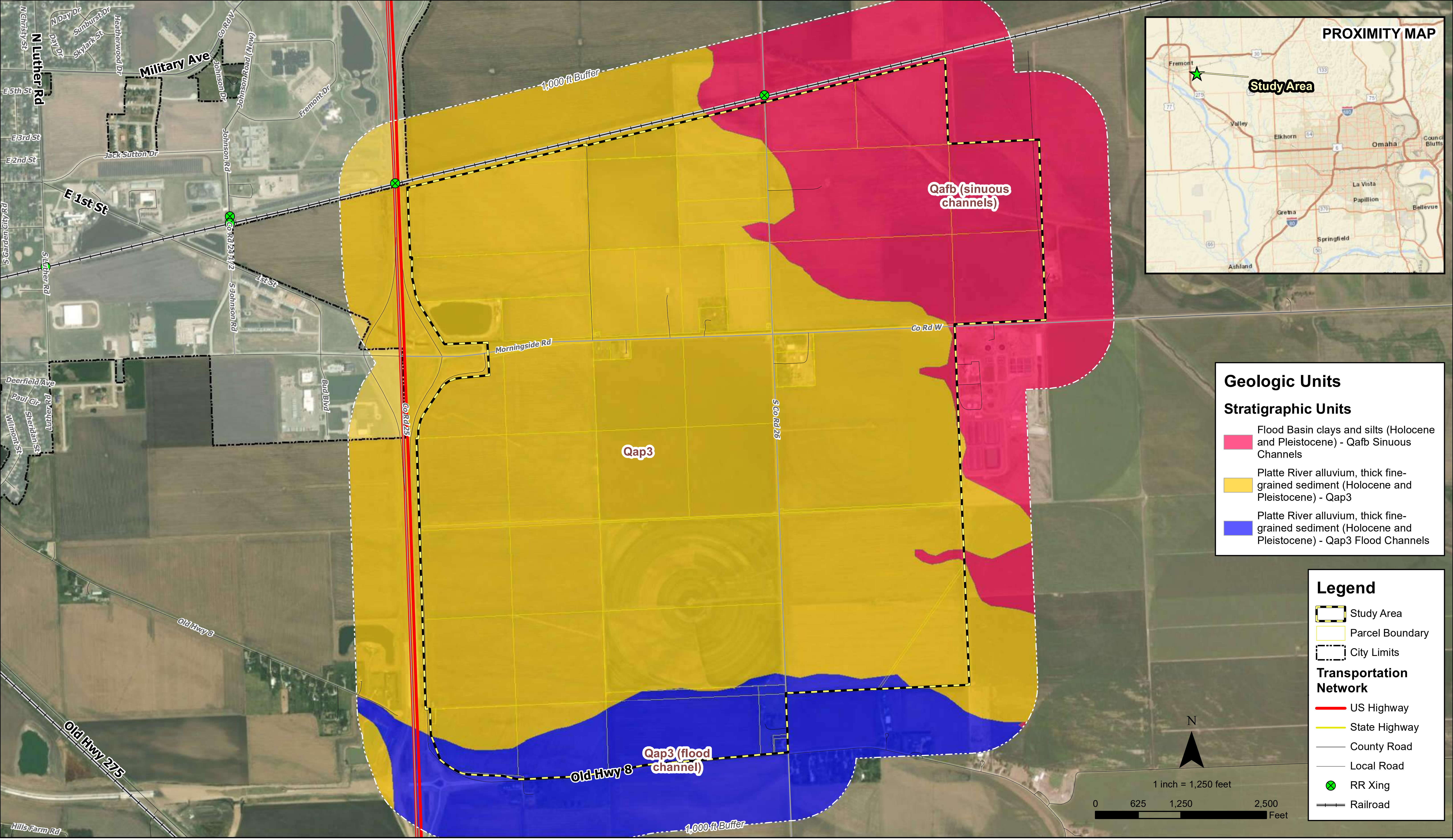


USGS Topographical Map

Fremont-Dodge Inland Port

CITY OF FREMONT NEBRASKA

BURNS & McDONNELL



CITY OF FREMONT NEBRASKA

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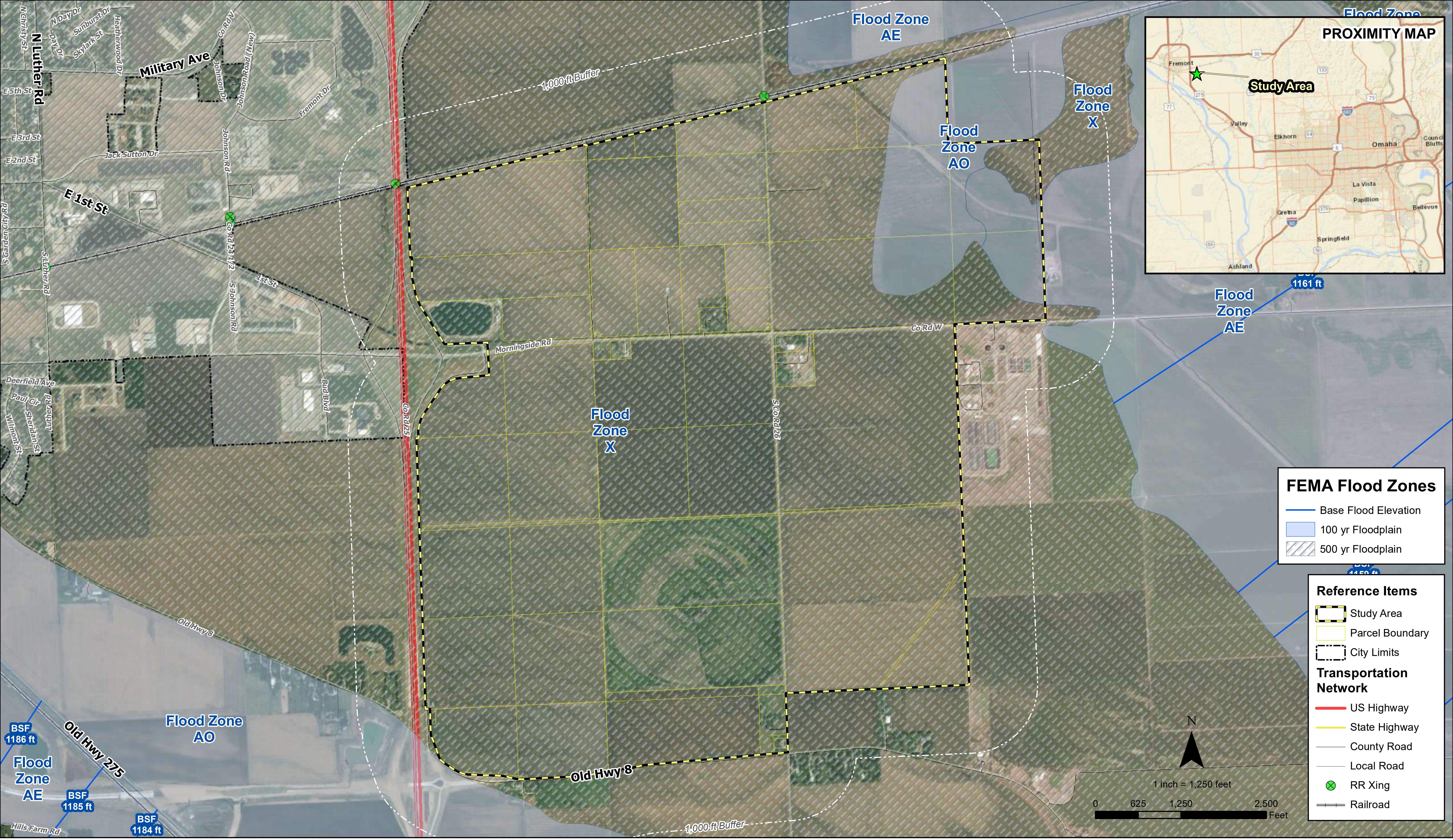
USGS Geological Formation Map

Fremont-Dodge Inland Port



CITY OF FREMONT NEBRASKA

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FEMA Flood Zone Map

Fremont-Dodge Inland Port

CITY OF FREMONT NEBRASKA

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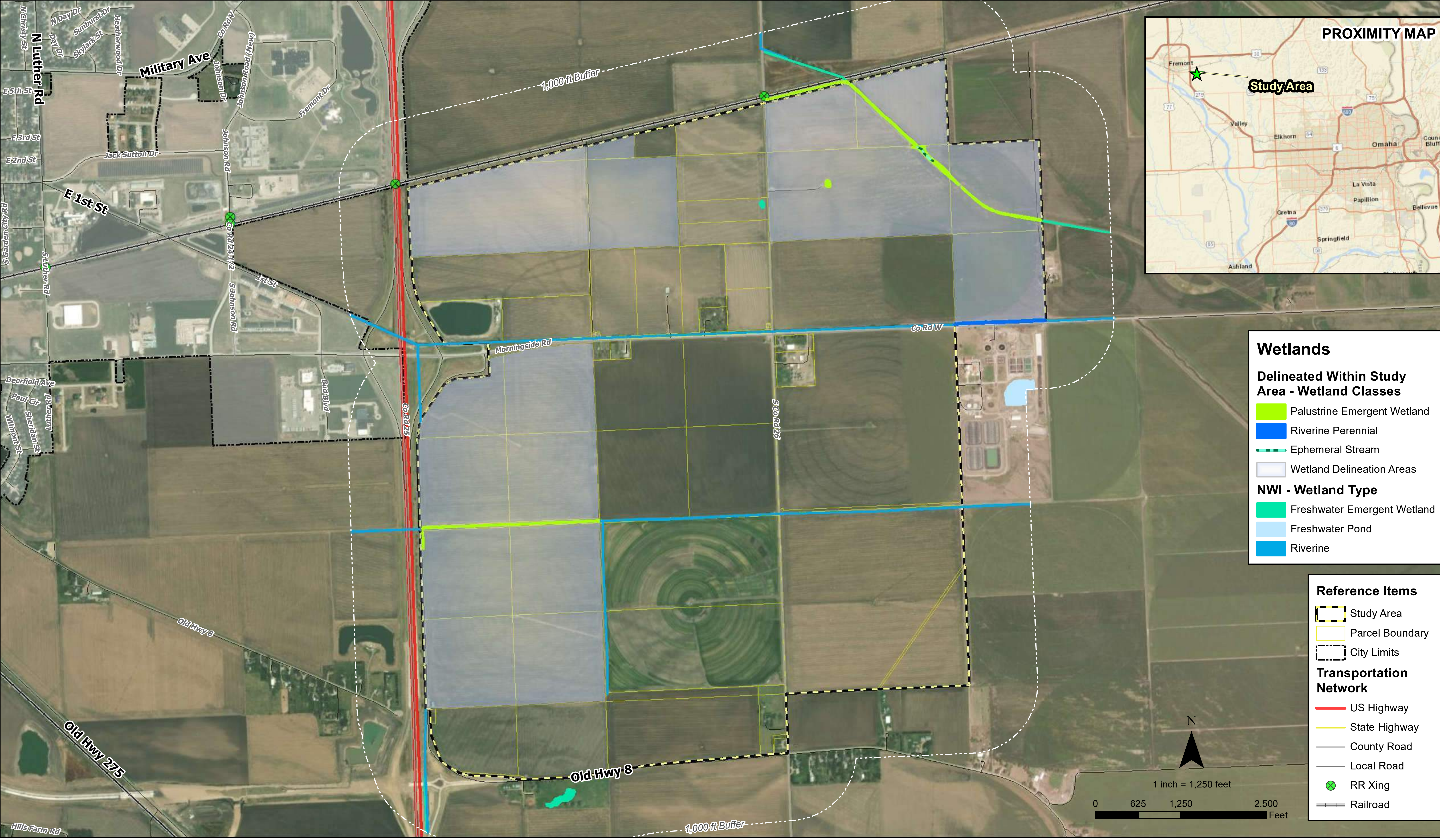
National Hydrography Dataset Map

Fremont-Dodge Inland Port

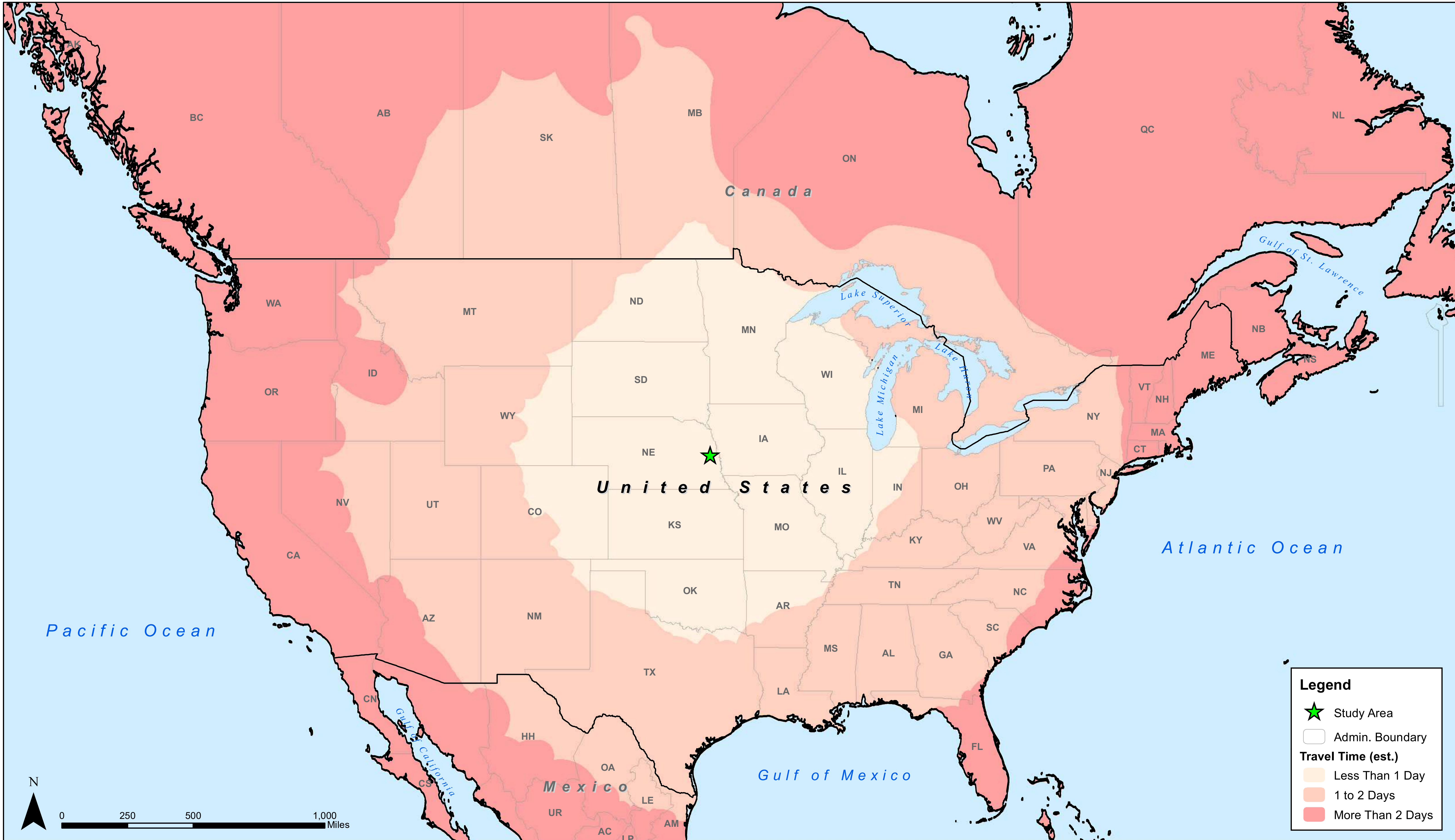


National Wetlands Inventory Map

Fremont-Dodge Inland Port

CITY OF FREMONT NEBRASKA

BURNS & McDONNELL

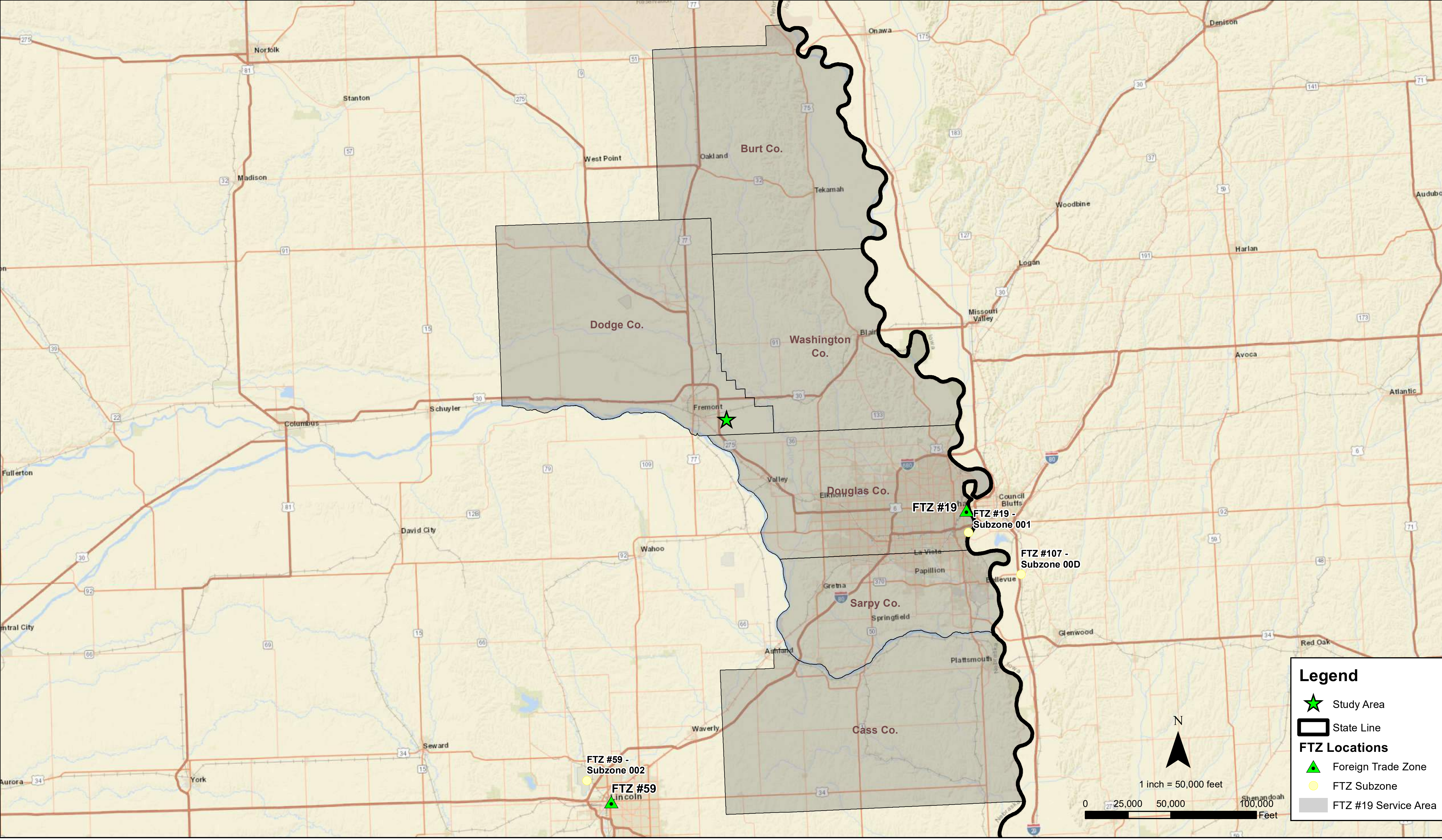


CITY OF FREMONT NEBRASKA

BURNS McDONNELL

Estimated Travel Time Map

Fremont-Dodge Inland Port



Foreign Trade Zone Map

Fremont-Dodge Inland Port

CITY OF FREMONT NEBRASKA

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CITY OF FREMONT NEBRASKA

BURNS & McDONNELL

Telecommunications Service Map

Fremont-Dodge Inland Port

Electrical Service Map

Fremont-Dodge Inland Port

CITY OF FREMONT NEBRASKA

BURNS & McDONNELL

Natural Gas Service Map

Fremont-Dodge Inland Port

CITY OF FREMONT NEBRASKA

BURNS & McDONNELL

Water Service Map

Fremont-Dodge Inland Port

CITY OF FREMONT NEBRASKA

BURNS & McDONNELL

Sanitary Sewer Service Map

Fremont-Dodge Inland Port

03 Targeted Industries Report

Semiconductor & Circuit Manufacturing in the US (33441a)

Industry Definition

The Semiconductor and Circuit Manufacturing industry includes companies that manufacture semiconductors and related devices and parts. Products in this industry include integrated circuits, memory chips, microprocessors, diodes, transistors, and other optoelectronic devices.

Industrial Siting Considerations

- Critical Factors
  - Site should be appropriately zone with sufficient buffering from neighboring, conflicting land uses
  - Locate near other competing operators to lessen distance advantage
  - Long-term contract options with key input producers
  - Requires Air permitting
  - Requires Hazardous Waste Disposal
  - Prefers site with large contiguous tracts with minimal elevation change
  - Must be outside of the 100yr FEMA Flood zone
  - Potential sites must either mitigate or avoid onsite wetlands

  - Significant Electric load capacities with redundant capabilities
  - Moderate to Significant Water Capacity
  - Moderate to Significant Wastewater Capacity
  - Low Natural Gas Capacity
  - Fiber optic internet access

Key Siting Proximity Opportunities

  - Locate near other producers of Semiconductor & Circuit Manufacturing inputs
  - Proximity to skilled workforce – preferably with connection to local university
  - Locate near port facilities and major roadway access to assist with the prospect of connect with overseas import and export networks

Key Suppliers Industries

- Semiconductor Machinery
- Chemical Product (over 200 different chemicals)
- Highly pure monocrystalline silicon
- Copper Rolling Drawing & Extruding
- Aluminum
- Mineral Product
- Nonferrous Metal Rolling Alloying

Key Buying Industries

- PC/Computer Sales
- Communications Equipment
- Industrial and government
- Automobile
- Consumer electronics

Executive Summary

Semiconductor technology is responsible for the creation, transfer and viewing of the words on this page. The core component of electronics and a vital input of products and services across the economy, semiconductor components are stuffed into computers, TVs, vehicles, microwaves, vending machines, servers, billboards, telecommunications and more. The Semiconductor and Circuit Manufacturing industry is one of the top export industries in the United States and, according to the Semiconductor Industry Association (SIA), indirectly provides jobs to more than 277,000 Americans. This diversification limits the risk for an otherwise incredibly technical and cash-hungry production process.

Manipulating silicon into thinking requires colossal capital inputs, economy-leading innovation, and strong international business relationships. Fewer than a thousand semiconductor facilities produce every electronic chip made in the country, primarily because new competitive entrants need cash flows on the scale of nation-states before producing a single chip. Equipment alone, aside from being dangerous in a dozen different ways, costs billions, as does hiring thousands of highly trained engineers at more than $100,000 each. These engineers need to think years in advance, creating chips that will be competitive with the likes of Intel and Samsung after release near 2028. A figurative network of supplier companies is also critical to make hundreds of high-precision inputs, all of which are necessary to transform a silicon wafer into computer chips.

Emerging economies, particularly in East Asia, have siphoned chip manufacturing through industrial policy, tax incentives and high-tech corridors with low-cost labor. Competition with foreign goods and the relative strength of the US dollar during COVID tempered export levels. As extreme chip demand during the pandemic-induced shortage ends, revenue will fall at an annual growth rate of 0.6% to $61.5 billion through 2023, dropping 4.6% this year alone. Profit is anticipated to reach 6.9% of industry revenue in 2023. Still, a new era is dawning for domestic semiconductor manufacturing. New opportunities in next-generation semiconductors and lavish government incentives will encourage operators to invest in domestic production. Simultaneously, a ban on the export of semiconductor manufacturing technology and certain semiconductor products to China will prove tumultuous. Until 2028, revenue is expected to increase at an annual growth rate of 2.5% to $69.7 billion.

Fremont Industrial Development Site Viability Rating: 4

Semiconductor and Circuit Manufacturing is currently undergoing significant changes due to the COVID 19 pandemic and supply chain issues that arose as a result. Other international tensions have exacerbated this issue by raising the prospect of semiconductors and/or circuit production as a national security issue. These recent events have prompted a number of manufacturing companies to diversity their physical location from the current concentrations in East Asia which the US Federal Government has passed legislation to incentivize the construction of new facilities within the US. Recent demand seems to indicate that the market for this industry segment is strong and will continue to grow. The current placement of Semiconductor and Circuit Manufacturing facilities within the US appear to coincide with areas that are near existing Semiconductor and Circuit design firms, concentrations of skilled workforce and/or universities with applicable training programs, or areas with ease of access to major blue-water ports. Currently, within the US the areas of concentration include the West Coast, The Southwest, and the Mid-Atlantic States.

Semiconductor and Circuit Manufacturing require significant capital to acquire the necessary equipment and other inputs thus precipitating the need for potential facilities to maximize economies of scale leading to the construction of large fabrication plants. These large plants will require ample land to locate facilities, buffer their activities from conflicting uses, and allow for future expansion. The Fremont Industrial Development Site provides ample land to accommodate this potential development type. The natural environment found within the site is also favorable for this industry type as the site is relatively free from both the FEMA 100-year floodplain and wetlands. Moreover, the site is extremely flat thus reducing the potential costs for site development. This industry type uses hazardous wastes and as such will need to locate with appropriate zoning and buffering from conflicting land use types which in its current state the development should be able provide.

Semiconductor and Circuit Manufacturing require significant capacity for Power and Telecommunications infrastructure. Electrical power service should be provided via a 3-Phase Line. Alternatively, Water, Wastewater and Natural Gas infrastructure typically have a lower required capacity for this industry. All utilities will benefit from access to redundant services to ensure that any plant would be able to avoid un-planned work stoppage. At present the Fremont Industrial Development Site has minimal access to a number of these utility types. Significant investment in new utility infrastructure is required to accommodate this industry segment.

Circuit Board & Electronic Component Manufacturing in the US (33441b)

Industry Definition

Companies in the Circuit Board and Electronic component Manufacturing industry primarily manufacture electronic components, except semiconductors and related devices, such as printed circuits, circuit boards, capacitors, transformers, connectors, and switches.

Industrial Siting Considerations

- Critical Factors
  - Site should be appropriately zone with sufficient buffering from neighboring, conflicting land uses
  - Locate near other competing operators to lessen distance advantage
  - Long-term contract options with key input producers
  - Prefers site with large contiguous tracts with minimal elevation change
  - Must be outside of the 100yr FEMA Flood zone
  - Potential sites must either mitigate or avoid onsite wetlands

  - Significant Electric load capacities with redundant capabilities
  - Low Water Capacity
  - Low Wastewater Capacity
  - Low Natural Gas Capacity
  - Fiber optic internet access

Key Siting Proximity Opportunities

- Locate near major shipping ports to access export network
- Locate near consuming manufacturing segments
- Proximity to skilled workforce – preferably with connection to local university
- Locate near port facilities and major roadway access to assist with the prospect of connect with overseas import and export networks

Key Suppliers Industries

- Printed circuit assembly
- Bare printed circuit boards
- Electronic connectors
- Other electronic components
- Capacitors, resistors, coils, transistors, and other inductors

Key Buying Industries

- Navigational Electronics Assembly
- Electromedical Electronics Assembly
- Automotive Electronics Assembly
- Weapons industries
- Consumer Electronics Assembly

Executive Summary

Printed circuit board revenue climbed at an annual growth rate of 0.7% in the past five years but rose just 0.1% in 2023 to reach $59.6 billion and a profit of 5.6%. COVID-19 rocked global supply chains, particularly those connecting US and Asian markets. Printed circuit board manufacturing and assembly plants briefly closed in 2020 before quickly reopening. A drop in production created order backlogs and a shortage of semiconductors and electronic components. The shortage coincided with massive demand for cars, phones and medical devices. Downstream semiconductor and electronics companies sought out printed circuit boards to take advantage of skyrocketing prices. Both overseas and domestic companies turned to US circuit board companies to fill supply gaps.

2020 and 2021 highlighted the global risks circuit board companies face. Semiconductor and other electronic product manufacturing take place overseas, encouraging printed circuit board companies to move offshore. The offshoring trend has put circuit board company revenue on a long-term decline. The CHIPS Act of 2022 invests heavily in onshoring semiconductor manufacturing for national security purposes. The bill leaves out key funding for printed circuit boards and assembly. Assembly requires sophisticated technology and quality control, making it difficult to scale in the United States.

Printed circuit board manufacturing has some support from the new Supporting American Printed Circuit Boards Act of 2022, which is still in the House. Printed circuit boards will need a government push to onshore. Semiconductor manufacturers in the United States already face rising costs and may resist purchasing domestic boards exclusively. The effect of the new government support remains unclear. China's COVID-19 lockdowns at the end of 2022 and extending into 2023 help printed circuit board companies in the short run. China accounts for a considerable percentage of imports, allowing domestic companies to pick up market share while production slows in China.

Printed circuit board revenue will fall slightly at an annual growth rate of 0.9% in the next five years, reaching $57.0 billion in 2028. Government support doesn't do enough to solidify consistent growth for manufacturing and assembly companies, but China's woes lead to growth in the short run.

Fremont Industrial Development Site Viability Rating: 5

Circuit Board & Electrical Component Manufacturing is currently undergoing significant changes due to the COVID 19 pandemic and supply chain issues that arose as a result. Other international tensions have exacerbated this issue by raising the prospect of semiconductors and/or circuit production as a national security issue. Special attention has been made for the products of this industry segment concerned with either Military, medical, and power generation or distribution. Recent demand seems to indicate that the market for this industry segment is strong and will continue to grow. The current placement of Circuit Board and Electronic Components Manufacturing facilities within the US appear to coincide with areas that are near major ports exporting to the Asian market, concentration of auto makers, and near concentrations of skilled workforce and/or universities with applicable training programs. Currently, within the US the areas of concentration include the West Coast, The Great Lakes, and the Mid-Atlantic States.

Circuit Board & Electronic Component Manufacturing require access to significant pools of highly skilled labor and access to potential domestic and international customers. An additional consideration is the need to an established connection or agreement with firms either providing inputs or with firms that are customers. Both of which could be established through geographic proximity or connection through low-cost transportation options. The natural environment found within the site is also favorable for this industry type as the site is relatively free from both the FEMA 100-year floodplain and wetlands. Moreover, the site is extremely flat thus reducing the potential costs for site development.

Circuit Board & Electronic Component Manufacturing require significant capacity for Electrical Power. Electrical power should be provided via 3-Phase lines and be provided via redundant paths. Water, Wastewater, and Natural Gas service is anticipated to be low. Nevertheless, all three utility infrastructures will need to be expanded to the site. Telecommunications access will need to be significant, with preference given to Fiber Optic Line access. Significant investment in new utility infrastructure is required to accommodate this industry segment.

Computer Manufacturing in the US (33411)a

Industry Definition

Companies in this industry manufacture and assemble personal computers, laptops and servers. Operators typically purchase computer components such as motherboards and graphics cards from dedicated manufacturers in other industries, such as the Semiconductor and Circuit Manufacturing industry (IBISWorld report 33441a).

Industrial Siting Considerations

- Critical Factors
    - Zoned for Industrial use
    - Long-term contract options with key input producers
    - Long-term contract options with key input producers
    - Located outside of FEMA 100-year floodplain
    - Significant Electric load capacities with redundant capabilities
    - Low Water Capacity
    - Low Wastewater Capacity
    - Low Natural Gas Capacity
    - Fiber optic internet access

Key Siting Proximity Opportunities

- Proximity to input materials
- Proximity to design firm clusters
- Locate Near Transportation Network
    - Ports (preferably shipping)
    - Proximity to Rail Hub

Key Suppliers Industries

- Electrical Equipment
- Circuit Board Components
- Semiconductor
- Wire & Cables

Key Buying Industries

- Information
- Public Admin
- Consumer Electronics Stores
- Computer Stores
- Educational Services

Executive Summary

Operators in the Computer Manufacturing industry have encountered increased risk related to international trade and lingering disruptions in the global supply chain due to pandemic-related shutdowns. Imports are crucial to the industry since they satisfy almost all domestic demand. Since supply chains were disrupted, it resulted in semiconductor prices rising and putting downward pressure on the industry. Overall, revenue fell at an annual growth rate of 1.8% to $10.6 billion over the five years to 2023, including a 0.8% decline in 2023. Profit has also declined to 4.7% of revenue in 2023 from 5.6% in 2018.

Since products are similar among manufacturers and imports have risen, it has resulted in fierce competition and falling prices for computers. Larger manufacturers have looked to acquire software-related companies because software complements computers and servers. Manufacturers would be able to cross-sell products and add an additional revenue stream. Some manufacturers have also relocated production outside the United States where there are lower labor costs.

Over the five years to 2028, revenue is expected to rise at an annual growth rate of 1.7% to $11.5 billion, as a weaker US dollar and improving supply chains contribute to industry growth. The US dollar value is expected to decline, resulting in domestic products becoming more attractive to foreign consumers, boosting exports for the industry. Improved supply chains will help to reduce the price of semiconductors, which are a crucial input to computers and will reduce pressure on industry profit.

Fremont Industrial Development Site Viability Rating: 5

Computer Manufacturing is highly dependent upon the cost of and ability to procure semiconductors and other technological component inputs for these Personal Computers and related electronics. Inputs for Computer Manufacturing make up between one half and three quarters of the industry cost structure, making it imperative that any operator maintain cost controls related to semiconductor suppliers and other necessary technological components. The US Government has recently passed legislation that will help to incentive a steady or increased, domestic consumer base. Infrastructure Investment and Jobs Act will provide funding to expand existing access to reliable internet to American consumers which is likely to bolster the production of technological devices. The CHIPS for America Act will incentivize the production of semiconductors and essential components of technological devices. This bill could encourage re-shoring of some operations that have been moved overseas. The existing composition of Computer Manufacturing sees nearly all inputs necessary are imported from overseas, primarily Asia. This is due in large part to the availability of lower cost labor and development incentives in Asian countries.

Proximity to semi-conductor manufacturers or colocation of production facilities with computer manufacturing is a perceived benefit. Currently, Semiconductor manufacturing is highly concentrated in Asia. By contrast Product design and development is more likely to occur within the US while assembly and production occur third-party ‘fab-shops’ outside of the US. Computer Manufacturing in the US is concentrated in the West Coast, The Southeast, and the Northeast. California is home to Silicon Valley and numerous firms which help design technological components of various types. California also has the best access to Pacific Shipping lanes. All three regions have access to large shipping ports.

The Fremont Industrial Development Site is located near both a four-lane highway and a railroad line. Both of these could help to reduce the costs associated with transportation of input products to the site and finished products to market. The anticipated tract size requirement for an end user in this industry is potentially varied. Nevertheless, the Fremont site has ample space to provide large, contiguous tracts of land otherwise unencumbered by either floodplain or wetlands.

Computer Manufacturing requires minimal capital investments as most costs associated with in this industry is in inputs as stated above. This will help to make a variety of site sizes potentially appropriate for future facility implementation. The main activity involved within this industry is the assembly of inputs procured from outside sources. This configuration is likely to reduce the need for Water, Wastewater, or Natural Gas capacity made available at the site. Alternatively, Electrical power need will be determined by the end-user and final facility configuration, but it is the opinion of this report that electrical capacity required by this industry user will be high with a requirement for 3-Phase line access via redundant paths. Telecommunications access will need to be significant, with preference given to Fiber Optic Line access.

Public Storage and Warehousing (49311)

Industry Definition

The industry provides third-party storage warehousing and storage services to the manufacturing, wholesale, and retail sectors. Companies use equipment like forklifts, pallets, and racks to handle goods in boxes, barrels, and drums. Industry companies avoid specializing in handling bulk products of any type, size, or quantity. Companies that rent or lease space for self-storage to consumers aren't included in this industry.

Industrial Siting Considerations

- Critical Factors
    - Zoned for Industrial Uses including protection for outdoor storage
    - Tracts of 50 acres or greater preferred
    - Configuration that supports adequate staging, buffering, and outdoor storage
    - No Major Elevation changes through the site
    - Free of Wetlands
    - Free of FEMA 100-year floodplain
    - Soils with adequate bearing capacity

    - Low to Moderate Electric load capacities
    - Moderate Water Capacity
    - Moderate Wastewater Capacity
    - Low Natural Gas Capacity
    - Fiber optic internet access with fiber optic line

Key Siting Proximity Opportunities

- Nearby Employment Centers
    - Manufacturing
    - Wholesale Trade
    - Retail Trade
    - Forklift and Conveyor Manufacturing
    - Building Construction
    - Local Freight Trucking
    - Local Industries (general storage)
    - Long-Distance freight trucking
- Locate near Major Vehicular Transportation Network
- Access to Rail and/or Airport Preferred

Key Suppliers Industries

- Wood pallets & Skids
- Industrial Machinery Equipment
- Electric Power Transmission
- Commercial Building Construction
- Commercial leasing

Key Buying Industries

- Wholesale Trade
- Retail Trade
- Manufacturing
- Local Freight
- Long-Distance Freight

Executive Summary

Public storage and warehousing have benefited from increases in consumer spending, leading to more shipments of consumer goods and greater demand for warehouse space. Despite the economic environment proving much more challenging during COVID-19 in 2020, the industry experienced growth. E-commerce sales increased 39.1%, leading to a 3.3% revenue hike in 2020 alone. Although internalization of warehousing by large, big-box retailers has somewhat tempered outsourcing demand, both businesses' demand for warehouse space and their likelihood of contracting it from third-party providers have increased, benefiting the industry during the current period. Industry-wide revenue has been growing at an annual growth rate of 2.7% over the past five years – including an estimated 2.3% surge in the current year – and is expected to total $35.4 billion in 2023, when profits will increase to 16.7%.

The industry has benefited from increased warehousing demand related to the growing prevalence of e-commerce, as many online sellers lack warehouse space. Still, e-commerce has also presented challenges for the industry. Products sold to consumers online take up more warehouse space and require more labor for processing, as they are shipped individually rather than palletized for bulk shipments to retailers. Although growth in e-commerce sales has been largely favorable to the industry, it has also raised wage and rental costs for companies, constraining profit in recent years. It has also spurred increased spending on technology during the current period, benefiting larger companies with the ability to make greater capital investments. According to a study in 2021 from Capgemini Research Institute, automation is leading the way, with 49.0% of retailers saying they will accelerate investments in this technology.

Increases in consumer spending, particularly online, will sustain industry growth. E-commerce will continue growing as a share of total retail sales, raising demand for third-party warehousing significantly, despite the associated challenges. Downstream companies will continue to report plans to increase their outsourcing, benefiting the industry. Industry revenue is expected to grow at an annual growth rate of 1.9% to $38.8 billion over the five years to 2028.

Fremont Industrial Development Site Viability Rating: 9

Public Storage and Warehousing is expected to see future growth due to the expectation of existing or planner manufacturing and on-line sellers to utilize third-party providers located throughout a sales region or area to facilitate this activity. Many of these business segments are looking towards an independent provider of Warehousing services that can offer innovative solutions for customers' needs while also shifting the liability of a brick-and-mortar facility(s). The arrangement of third part providers is also a potential fit for foreign firms as they likely lack facilities within the US. The primary locations for Public Storage and Warehousing facilities throughout the US are those within proximity to shipping ports, navigable rivers, or intercostal waterways, and or major airports. Regardless, other successful sites are served by major roadways or Main Line Rail connections.

Multiple forms of transportation are preferred for adequate staging, buffering, and outdoor storage. This site provides access to US 275 with nearby connections to Interstate 80 and Interstate 29. Siting requirements are likely to require a relatively small percentage of the total development area. With significant sections of the development area free from environmental or natural separating barriers the future development would be able to accommodate many different specifications related to the implementation of Public Storage and Warehousing. Additionally, the site is bisected by the Union Pacific Rail line which could be expanded to provide access. The Fremont Industrial Development Site provides ample land to accommodate this potential development type. The natural environment found within the site is also favorable for this industry type as the site is relatively free from both the FEMA 100-year floodplain and wetlands. Moreover, the site is extremely flat thus reducing the potential costs for site development.

The current site service by electrical and telecommunications is likely sufficient for a first user within this industry segment. With the wastewater treatment plant in proximity, it is anticipated that the investments to provide adequate and redundant sanitary sewers would be minimal. Potable Water service too is in the vicinity and would require minimal expansion. Natural Gas would need to be expanded across Highway 275 and would be able to serve a first user within a short time frame. Existing electrical power has limited capacity but could potentially serve a smaller user immediately. The extension of the electrical service will likely require more significant investment.

Refrigerated Storage in the US (49312)

Industry Definition

The Refrigerated Storage industry includes companies that operate refrigerated warehousing and storage facilities. Temperature-controlled services include blast freezing and tempering. Operators that primarily store furs for trade are included in this industry. These furs are used as raw materials for the manufacturing of garments and personal accessories such as bags and shoes.

Industrial Siting Considerations

- Critical Factors
  - Zoned for Industrial use
  - Long-term contract options with key input producers
  - Located outside of FEMA 100-year floodplain.
  - Free of Wetlands
  - Certain facilities will need effluent waste permitting
  - Access to available, low-wage workforce
  - Dependent on population spread and retail establishments
  - Operators should incorporate long-term sales contracts

  - Moderate Electric load capacities via 3-Phase line
  - Low Water Capacity
  - Low Wastewater Capacity
  - Low Natural Gas Capacity
  - Fiber optic internet access

Key Siting Proximity Opportunities

  - Proximity to Livestock production, perishable food production, and pharmaceutical manufacturers
  - Within established routes of major logistics hubs
  - Locate Near Transportation Network
    - Four-Lane Highway (preferably Interstate)
    - Ports (preferably shipping)
    - Proximity to Airport or Rail hub preferred

Key Suppliers Industries

- Refrigeration Equipment
- Heating & Air Conditioning Wholesaling
- Commercial Leasing
- Storage and Warehouse Leasing
- Electric Power Transmission
- Forklift & Conveyor Manufacturing

Key Buying Industries

- Public Storage & Warehousing
- Tank & Refrigeration

- Food Product Wholesalers & Manufacturers & Retailers
- Wholesale Trade
- Local specialized Freight

Executive Summary

Businesses in the Refrigerated Storage industry operate refrigerated warehousing and storage facilities. The industry also includes temperature-controlled services like blast freezing and tempering. As an industry that specializes in providing storage and logistics services to manufacturers, wholesalers and retailers of food products, industry performance is highly sensitive to changes in consumer demand for food products. Increasing consumer spending has facilitated spending on a variety of food products, surging demand for refrigeration services. Companies that specialize in providing logistics services to foreign manufacturers and storage services for soon-to-be exported goods are benefiting from healthy US trade activity. However, some downstream companies have shifted operations to manage their own warehouse facilities instead of outsourcing these functions to refrigerated storage companies, hindering industry performance.

Government issued stay-at-home orders, social distancing rules and establishment restrictions amid the COVID-19 (coronavirus) pandemic significantly reduced demand from restaurants and other food-service providers. However, this has been offset by spikes in demand for groceries and frozen foods, as consumers sheltered in place and refrained from eating out. Refrigerated storage revenue has expanded at an annual growth rate of 2.3% to $8.4 billion over the past five years, pushed up by a 2.5% increase in 2023 alone as restrictions ease and demand from restaurants renew. Moreover, revenue growth has outpaced the cost of labor, resulting in higher profitability.

Moving forward, industry performance will be bolstered by revived growth in the total value of US trade activity, rebounds in consumer spending and higher commodity prices through the end of 2028. Increased outsourcing of warehouse services to refrigerated storage companies will also stimulate growth. Also, nonessential businesses will fully resume operations due to the widespread distribution of the COVID-19 vaccine, enabling downstream industries to operate uninhibited. Refrigerated storage revenue will expand at an annual growth rate of 2.6% to $9.6 billion over the next five years.

Fremont Industrial Development Site Viability Rating: 8

Demand for frozen foods is recovering from the decreased demand and disruptions to the supply chain caused by the COVID 19 related shut-down. These industries are experiencing a strong recovery in 2023. Increased levels of disposable income will help to increase the purchase of high-quality foods thereby increasing potential profit within this industry segment. Continued use of e-commerce has the potential to enhance this industry as refrigeration storage companies provide Logistics Consulting and supply chain management services. The main customers for this industry are wholesalers, retailers, and manufacturers of food products. Current trends within this industry have seen large-scale food services companies begin operating distribution and storage functions in-house, by passing refrigerated storage companies. Many smaller food service companies have continued to rely on third-party refrigerated storage providers to help offset the high capital costs. Private refrigerated storage facilities require significant capital investments. Industry wages comprise approximately one-third of the cost structure. Most establishments operate sites that are small. This industry is impacted by both domestic and imports, however, imports are likely to have a greater impact on those facilities located along the coasts.

The industry is currently concentrated in the Southeast, the West Coast, and the Great Lakes Regions. The southeast has access to large workforces offering low wages. This area is also home to one of the largest operators in this industry. The west coast has a large population that demands high quantities of food and medicine and is the major hub for pharmaceutical manufacturing. The Great Lakes region has access to a sizable portion of this country's livestock and food production and serves as a primary transportation hub within the US.

The site will benefit from access to Highway 275 and the adjacent Union Pacific Rail line. Access from a future refrigerated storage development site to an expanded railyard may help to incentivize a potential end user that relies on arrival or departure of products via refrigerated rail cars. The available land on the site will provide ample space for future development free from the FEMA floodplain and wetlands.

Utility needs for a facility within this industry will vary from storage of fresh products that require tepid conditions to sub-zero storage of ice cream and other frozen foods. The current understanding of the anticipated electrical capacity at the site seems to be adequate for a small to moderate scale facility. Water, wastewater, and natural gas needs are likely to be low. Telecommunications should be provided via fiber optic lines which will potentially require minimal extension of existing telecommunication lines.

Farm Product Storage & Warehousing in the US (49313)

Industry Definition

This industry operates bulk farm product warehousing and storage facilities, except refrigerated storage. Warehouses generally provide facilities and storage services for agricultural goods and are responsible for maintaining their security and condition. However, warehouses do not take ownership of or sell those goods. Most operators are involved in storing grain and other farm products.

Industrial Siting Considerations

- Critical Factors
    - Zoned for Industrial use
    - Adequate space and buffering outdoor parking, staging, and large truck movement
    - Large tracts of contiguous land
    - Air Permitting may be required
    - Located outside of FEMA 100-year floodplain.
    - Free of Wetlands
    - Operators should incorporate long-term sales contracts

    - Low Electric load capacities
    - Low Water Capacity
    - Low Wastewater Capacity
    - Low Natural Gas Capacity
    - Fiber optic internet access

Key Siting Proximity Opportunities

- Proximity to grain producers
- Within established routes of major logistics hubs
- Locate Near Transportation Network
    - Four-Lane Highway (preferably Interstate)
    - Navigable waterways to facilitate barge transportation
    - Site Layout with adjacent Rail access

Key Suppliers Industries

- Industrial Building Construction
- Agriculture-related Commercial Leasing
- Local Specialized Freight
- Tank Manufacturing
- Electrical Power Transmission
- Storage & Warehouse Leasing

Key Buying Industries

- Agriculture Forestry, Fishing and Hunting
- Grain Crop Farming
    - Corn, Wheat, & Soybean
- Farm Supplies Wholesaling

- Grocery Wholesaling

Executive Summary

Companies in the Farm Product Storage and Warehousing industry operate bulk farm product warehousing and storage facilities. Industry performance depends on the agricultural market and related international trade, as operators generate revenue by transporting, storing and packing agricultural goods. Farm-level decisions on when and how much of that agricultural output to store are subject to numerous influences that may be volatile in nature. As a result, industry performance shifts each year. For example, weather patterns affect crop yields, while global production and demand drive prices. Based on these factors, farmers decide what products to store to maximize profit in a given season. Altogether, industry revenue has risen over the five years to 2022, growing an annualized 0.1% to $923.6 million, including growth of 1.4% in 2022 alone.

When farmers encounter lower commodity prices, they are more likely to store grain in anticipation of future price appreciation. In addition to domestic markets, the industry is affected by global agricultural trade trends, as the industry facilitates the export of US crops and provides value-added services, such as grain drying and prepackaging. The appreciation of the US dollar can negatively influence industry revenue, making US goods relatively more expensive to foreign buyers. Industry performance over the past five years has been affected by increasing demand for US agricultural exports, declining domestic consumption of wheat and corn-based sweeteners and some disintermediation of industry operators from supply chains. Moreover, the industry was affected in 2020 due to the COVID-19 (coronavirus) pandemic, which negatively affected industry revenue due to declining commodity prices. As a result, industry revenue growth has been limited during the current period.

Over the five years to 2027, industry revenue is forecast to grow at a marginally faster rate, contending largely with the same conflicting demand trends. Due to demand from developing countries, US agricultural exports are expected to remain strong. However, a continued decline in consumption of wheat and corn-based sweeteners by health-conscious domestic consumers is expected to hurt demand for corn and wheat storage domestically. As a result, industry revenue is anticipated to increase at an annualized rate of 0.6% to $950.8 million over the five years to 2027.

Fremont Industrial Development Site Viability Rating: 10

This market suffers significant volatility due primarily to the changing price of grains. The relationship between future price increase or depreciation tends to influence farmer's decisions. When the price is low the demand for storage will increase due to a desire to wait for prices to improve. While this will generate revenue for industry operators, it also reduces turnover rates, and demand for value-added services. As an intermediary between production and wholesale distribution, the Farm Product Storage & Warehousing operators are subject to a variety of demand influences. Wheat, corn, and soybean production are the three largest downstream markets for this industry. Operators within this industry are typically located within areas with high crop-yields. The Southeast has the largest concentration of establishments within this industry and is home to a number of ports capable for accommodating exports, the warmer climate can produce two harvest seasons per year and is home to a number of densely populated urban areas. The Plains region has the second highest concentration of Farm Product Storage facilities due in large part to the expansive regions of high-yield corn and wheat. The Great Lakes region is home to the third largest concentration due to its many high producing farms and improved access to international markets due to the proximity to Canada and access to shipping lanes via natural waterways.

Electric power, water, and natural gas will be needed but the overall anticipated capacity needed is anticipated to be low. However, if the end user has a focus on automation, then the anticipated need for electrical power should be increased to accommodate. Access to road and rail transportation is one of the most important siting conditions, ensuring quick and efficient delivery of grains to port. The Fremont Industrial Development Site can provide high levels of both road and rail access through Highway 275 and the Union Pacific Rail line which are located on site. Furthermore, proximity to both Interstate 80 and 29 as well as barge facilities on the Missouri River will enhance the ability of a Farm Product Storage facility at this site. The industry is subject to low profit margins, making economies of scale an important factor. A potential developer within this industry may be more likely to construct a facility able to handle large quantities of grain making it necessary to find large tracts of land. The potential grains being stored may require air permitting due to the aerial debris created by moving these materials. Furthermore, additional services might include the use of toxic materials. The Fremont Industrial Development Site has ample contiguous tracts available to accommodate this industrial use. Furthermore, the site is buffered from existing residential or other commercial areas which will help to eliminate conflicts from noise, traffic, or on-site pollution.

Meat, Beef & Poultry Processing in the US (31161)

Industry Definition

Operators in this industry slaughter animals, process the carcasses and package the meat into products and byproducts. The industry also purifies and refines animal fat, bones and meat scraps. Products are sold to other food manufacturers, renderers, grocery and meat wholesalers and retail traders. Enterprises that mainly cut and pack meats from purchased carcasses are also included in this industry.

Industrial Siting Considerations

- Critical Factors
    - Zoned for Industrial use
    - Adequate space and buffering outdoor parking, staging, and large truck movement
    - Large tracts of contiguous land
    - Effluent Permitting may be required
    - Located outside of FEMA 100-year floodplain.
    - Free of Wetlands
    - Operators should incorporate long-term sales contracts

    - Moderate Electric load capacities with redundant capabilities preferred
    - Moderate Water Capacity
    - Moderate Wastewater Capacity
    - Low Natural Gas Capacity
    - Fiber optic internet access

Key Siting Proximity Opportunities

- Proximity to Livestock production and grain production
- Proximity to dense urban areas and large consumer base
- Locate Near Transportation Network
    - Four-Lane Highway (preferably Interstate)
    - Site Layout with adjacent Rail access

Key Suppliers Industries

- Beef Cattle Production
- Hog & Pig Production
- Poultry Production
- Sheep Farming
- Animal Feed – Related industries
- Industrial Machinery & Equipment Wholesaling

Key Buying Industries

- Beef & Pork Wholesaling
- Frozen Food Production
- Grocery Wholesaling
- Meat Markets
- Specialty Food Stores

- Fast Food Restaurants

Executive Summary

The Meat, Beef and Poultry Processing industry involves the slaughtering, processing and packaging of livestock and poultry. Meat processors have contended with volatile meat prices from drought, disease and unstable feed prices over the five years to 2023, as well as the COVID-19 pandemic, but revenue still rose. Demand both in the US and abroad exhibited strong growth as per capita disposable income increased and consumers were more able to purchase premium cuts of meat. China agreed to import more meat products as part of the phase two trade deal between the US and China in 2020. Boosted export activity as the economy recovered and international trade resumed greatly benefited US meat processors with the production capacity and efficiency to serve emerging markets overseas. Despite price volatility, industry revenue will grow at an annual growth rate of 2.6% to $295.9 billion in 2023, including a rise of 0.5% in 2023. Profit has also grown 5.2%.as red meat prices have outpaced feed costs and operators lowered costs through vertical integration.

Meat products are a staple of Americans' diets. Demand for products is reliant on the overall economy and household income, so the growing pre-pandemic economy boosted demand for beef, pork and poultry. Though COVID-19 forced meat processors to contend with stay-at-home orders and a drop in demand from restaurants, reliable consumer spending buoyed demand for meat products. While many industries had operators closing up shop in 2020, meat, beef and poultry processing revenue increased 2.2%. Spiking meat prices and export growth in the years following the pandemic lifted revenue even further, jumping a massive 10.4% in 2021.

Revenue will grow at a markedly lower rate over the next five years. Demand in the US is relatively static, so the ability to service overseas markets will give meat processors the step-up in revenue they are looking for. While demand from China for will lessen as the country contains its African Swine Flu outbreak and recovers its pork production self-sufficiency, demand from other export destinations will rise as meat consumption and disposable income increase demand for beef, pork and poultry. Meat, beef and poultry processing revenue will increase an annualized 0.3% to $300.4 billion over the five years to 2028.

Fremont Industrial Development Site Viability Rating: 10

The cost of feed as a major input cost will favor those sites which are located near grain production and/or Storage facilities. Purchases of inputs for this industry account for approximately ½ of cost structure further emphasizing the need to locate near grain production and establishing sales contracts with grain producers. Meat wholesalers dominate sales to meat markets. Conversely, local butchers, specialty meat shops, delis and meat departments or large grocery store chains make a smaller market share. The perishable nature of the product works to complicate long-range shipping making shorter supply chains helpful to mitigate loss.

The southeast is home to the largest concentration of meat processing facilities. This region hosts many poultry and livestock operations, hosts significant grain production, and has access to the Gulf Coast ports and the border with Mexico. The Plains region has the second largest concentration. This area is home to significant grain production, hosts significant swine production, and has reduced land prices which helps to limit the cost of entry for a new facility. The Great Lakes has the third highest concentration of meat processing in the US. This area is benefited by proximity to the Great Lakes and associated transportation systems and is also connected via these low-cost transportation routes to the heavily populated areas of New England.

Large facilities allow operators to achieve higher levels of efficiency and offer lower prices to consumers. These larger facilities are more likely to occupy bigger contiguous tracts of land that offer significant space for truck and rail transportation. This industry has experienced a high level of vertical integration which would favor the siting of a new facility near an existing or planned facility which operates in any industry either selling to or buying from a meat processing facility. The US is, currently a net-exporter of processed meats with the primary destination being China. Access to efficient transportation routes to the Pacific from the Fremont Industrial Development Site is preferred.

Anticipated Electrical, Water, and Wastewater utilities use is considered moderate for this industry user. All three utility types will need to be updated at the Fremont site to accommodate a potential end user. Electrical power should be provided via a 3-Phase electric line with a preference given to redundant service to a development site. Natural Gas utility needs for this industry user is likely to be low. Telecommunications should be provided via fiber optic lines which will potentially require minimal extension of existing telecommunication lines.

Snack Food Manufacturing in the US (31191)

Industry Definition

The Snack Food Production industry produces snack foods such as potato and corn chips, pretzels, roasted and salted nuts, nut butters, popcorn, and other similar snacks. However, it does not produce cookies, crackers, bakery products, cereal, or granola bars.

Industrial Siting Considerations

- Critical Factors
  - Site should be appropriately zone with sufficient buffering from neighboring, conflicting land uses
  - Air permitting capability.
  - Effluent permitting capability
  - Locate near other competing operators to lessen distance advantage
  - Long-term contract options with key input producers
  - Prefers site with large contiguous tracts with minimal elevation change
  - Must be outside of the 100yr FEMA Flood zone
  - Potential sites must either mitigate or avoid onsite wetlands

  - Low Electric load capacities with redundant capabilities preferred
  - Low Water Capacity
  - Low Wastewater Capacity
  - Moderate Natural Gas Capacity with redundant capabilities preferred
  - Fiber optic internet access

Key Siting Proximity Opportunities

  - Locate near sources of key ingredients – flour, corn, and sugar
  - Locate near distribution channels in major cities
  - Locate near consuming base
  - Proximity to road and rail transportation

Key Suppliers Industries

- Fruit & Nut Farming
- Sugar Processing
- Flour Milling
- Corn, Wheat, & Soybean Wholesaling
- Vegetable Farming

Key Buying Industries

- Grocery Wholesaling
- Convenience Stores
- Specialty Food Stores

Executive Summary

The Snack Food Production industry, which creates goods, such as potato and corn chips, pretzels, roasted and salted nuts, peanut butter, and popcorn, has benefited from increased demand. As the economy grew during most of the period, discretionary income levels climbed. In turn, consumer spending has boosted sales of potato and tortilla chips, along with nuts and seeds. Moreover, the emergence of artisanal goods, which are made with a higher degree of craftsmanship and command higher prices, has boosted revenue. As consumers turned to snacking due to the COVID-19 pandemic, industry revenue climbed further. Overall, industry revenue has increased at an average rate of 0.4% to $48.4 billion over the five years to 2023, although growth is forecast to increase 0.8% during the current year.

Shifting food consumption trends have affected the strategies of snack food producers during the period. Snacking habits have been on the rise in recent decades, with millennials accounting for the largest demographic. Additionally, health concerns about eating foods high in sodium, fat and sugar have made consumers wary of buying traditional snacks. While this has limited industry revenue growth, it has also developed a niche market in the industry. Producers have introduced new varieties of existing products, such as reduced-fat and reduced-sodium brand extensions and new gluten-free and organic products, leading industry revenue to rise overall during the period. New premium products have helped boost revenue and profit, which has risen over the current five-year period.

Improving economic conditions for consumers are forecast to further lift demand for snacks over the next five years. Projected increases in per capita disposable income will likely enable more consumers to trade up to premium brands, helping drive revenue growth during the outlook period. As consumers continue demanding healthy versions of existing snacks, operators will likely introduce a wider variety of products. Profit is expected to remain stable over the next five years, enticing new companies to enter the industry with innovative new concepts. Overall, industry revenue will increase at an average annual rate of 1.9% to $53.1 billion over the five years to 2028.

Fremont Industrial Development Site Viability Rating: 7

Snack Food Manufacturing has enjoyed a relatively stable market in the past few years. Despite the COVID 19 pandemic, sales have remained stable and, in some cases, have even increased due to an increase in snacking from consumers obligated to remain at home. This contrasts with increasing costs related to inputs within this sector which make up nearly half of the cost structure for Snack Food Manufacturing. Entry to a new user within this industry segment has varying capital requirements as this market allows for differing profit margins for smaller installations catering to niche markets. Alternatively, economies of scale are preferred to accommodate products that are enjoyed by a broader portion of the consumer base and necessitates a lower sale price. Trends within this market appear to show an increased consumer preference for low-calorie and low processed types of snack food favoring nuts and seeds, the majority of which are grown in California. Another beneficial factor is the proximity to major cities and/or consumer bases, most notably along the east and west coasts as well as the southwest. Manufacturers could offset proximity to these markets through the access of high-volume road and/or rail transportation.

The Fremont Industrial Development Site is near both major transportation routes via Highway 275 and is adjacent to Union Pacific rail line. Furthermore, the site is near existing facilities owned and operated by Conagra Foods (the second largest operator in the US market) which could be advantageous to either Conagra or a potential competitor to locate. Furthermore, several of the raw ingredients are grown within relatively proximity to the sites located within the Midwestern plains.

An end user within this industry segment is likely to have a wide-ranging need, in terms of utilities as the potential site size can vary greatly. Nevertheless, proximity to the nearby wastewater treatment plant will help to lower the cost to accommodate this industrial use. The site will also benefit from an increased capacity of water and natural gas. Some products included in this industry may have large requirements for water use (i.e. Potato Chip Production). Electrical utility use will vary based on the end user and the scale of operations implemented. It is anticipated that a typical user in this industry will require a relatively low need for Electrical Power, Water Capacity, and Wastewater Capacity. Nevertheless, Electrical infrastructure should be provided via 3-Phase lines with a preference given for redundant services.

Baking Mix & Prepared Food Production in the US (31199)

Industry Definition

Operators in this industry produce perishable prepared foods, such as sandwiches, meals and peeled or cut vegetables. Industry operators use dried and dehydrated ingredients to produce dessert mixes, flavoring powders, and processed eggs.

Industrial Siting Considerations

- Critical Factors
    - Site should be appropriately zone with sufficient buffering from neighboring, conflicting land uses
    - Air permitting capability
    - Effluent permitting capability
    - Locate near other competing operators to lessen distance advantage
    - Long-term contract options with key input producer and potential buyers
    - Prefers site with large contiguous tracts with minimal elevation change
    - Must be outside of the 100yr FEMA Flood zone
    - Potential sites must either mitigate or avoid onsite wetlands

    - Low Electric load capacities with redundant preferred
    - Low Water Capacity
    - Low Wastewater Capacity
    - Moderate Natural Gas Capacity
    - Fiber optic internet access

Key Siting Proximity Opportunities

- Locate near buying industries
- Locate near distribution channels in major cities
- Locate near consuming base
- Proximity to road and rail transportation

Key Suppliers Industries

- Dairy Product Production
- Sugar Processing
- Flour Milling
- Meat, Beef, & Poultry Processing
- Canned Fruit & Vegetable Processing
- Chicken Egg Production

Key Buying Industries

- Cereal Production
- Bread Production
- Snack Food Production
- Frozen Food Production
- Grocery Wholesaling

- Convenience Stores
- Specialty Food Stores

Executive Summary

This industry produces a variety of goods, including perishable foods, prepared meals and sandwiches, sweetening syrups, dried and dehydrated ingredients, dessert mixes, flavoring powders, and egg products. Over the past five years, operators have competed with increased health consciousness among consumers. To stay relevant, producers have been forced to introduce a variety of healthier prepared foods to appeal to the growing health-conscious consumer base. These healthier alternatives are often more expensive to manufacture, but command premium retail prices. During most of the period, per capita disposable income has increased, supporting revenue growth. When disposable income increases, consumers are more likely to purchase discretionary goods, including dessert mixes and organic prepared foods. Revenue is projected to fall 0.6% in 2023 due to rising input prices and slow consumer spending growth. Revenue has increased at an annual growth rate of 0.3% to $36.5 billion over the five years to 2023.

Over the past five years, domestic producers have competed with international importers by successfully adapting to consumers' increasingly health-conscious dietary preferences. Health concerns over contaminated products helped curb some of the competition from imports. Even so, imported products benefit from lower production costs and can sell at lower price points. Operators have been unable to maintain strong margins in the face of overseas competition with profit falling to 1.7% in 2023.

Over the next five years, a strong economic recovery is expected to buoy industry growth. Growing health consciousness among consumers, though, will continue as consumers seek fresh ingredients instead of processed foods. This trend will limit growth unless operators continue to adapt to rapidly changing preferences. Even so, consumers will turn to on-the-go prepared foods as they return to work following the pandemic. Revenue is set to grow at an annual growth rate of 1.4% to $39.2 billion over the next five years.

Fremont Industrial Development Site Viability Rating: 7

The Baking Mix & Prepared Food Production has experienced volatile input prices which may limit future growth. This stressor within the industry may have a significant impact on smaller firms while larger ones may be able to leverage brand name and pass along additional costs to loyal customers. Canada and Mexico are significant export destinations dur to their close geography and affiliation with the United States, Canada, & Mexico Act (USCMA) which keeps prices low. Developing nations are anticipated to experience increased demands thus increasing exports from the US market. It is anticipated that increasing time demands on the modern family and low unemployment rates will help to increase demand for ready to eat meals. Customers will likely frequent restaurants as disposable income rise. The purchase of inputs for this industry accounts for over half of the cost structure. Locating nearer to industry inputs will help to offset the cost of transportation. Operators are largely unable to mitigate the risk of raw material availability caused by conflict, climate, or disaster. Successful producers maintain good relationships and secure favorable contracts with suppliers.

The West Coast has the largest concentration of Baking Mix and Prepared Food Production in the US. The West is home to densely populated areas and has access to shipping lanes in the Pacific and other well-established infrastructure. The Great Lakes region has the second largest concentration of these facility types. This area is near the Great Plains, which provides many of the inputs needed to help to lower transportation costs. The Great Lakes is also home to many food producers which purchase products from the Baking Mix & Prepared Food Production industry. The Mid-Atlantic has the third largest concentration of establishments within this industry. This region is home to some of the largest metropolitan areas within the US and benefits from their proximity to Canada, the largest importer/exporter for the industry.

Economies of scale enable the largest producer to offer the widest product array. Conversely, many operators of smaller facilities cater to smaller populations and niche markets. This helps to diversify the size of potential development site needed to facilitate this industrial segment within the Fremont Industrial Development Site.

An end user within this industry segment is likely to have a wide-ranging need, in terms of utilities as the potential site size can vary greatly. Unless otherwise located in remote areas, food processing facilities are required to pretreat and discharge wastewater directly into a publicly owned treatment plant. Given the proximity to the nearby wastewater treatment plant will help to lower the cost to accommodate this industrial use. Natural Gas Capacity is anticipated to be moderate relative to anticipated capacity for this industry user. Electrical use will again vary based on the end user and the scale of operations implemented. Nevertheless, it is anticipated that electrical power capacity will be low.

Truck, Trailer, & Motor Home Manufacturing in the US (33621)

Industry Definition

Operators in this industry primarily produce motor vehicle bodies and cabs, trucks, automobile and utility trailers, truck trailer chassis, detachable trailer bodies and detachable trailer chassis.

Industrial Siting Considerations

- Critical Factors
  - Zoned for Industrial use with adequate buffers with conflicting uses
  - Flexibility to provide wide-ranging size of tracts of contiguous developable land for large scale facilities
  - Ability to access extensive distribution networks
  - Operators should incorporate long-term sales contracts
  - Located outside of FEMA 100-year floodplain.

  - Moderate Electric load capacities with redundant capabilities preferred
  - Low Water Capacity
  - Low Wastewater Capacity
  - Moderate Natural Gas Capacity with redundant capabilities preferred
  - Fiber optic internet access

Key Siting Proximity Opportunities

- Proximity to raw materials
- Proximity to related manufacturing clusters
- Proximity to buying clusters
- Locate Near Transportation Network
  - Four-Lane Surface Transportation
  - Proximity to Rail Hub

Key Suppliers Industries

- Automobile Engine & Parts Manufacturing
- Tire Manufacturing
- Iron & Steel Manufacturing
- Ferrous Metal Foundry Products

Key Buying Industries

- Recreational Vehicle Dealers
- Automobile Wholesaling
- Local & Long-Distance Freight Trucking

Executive Summary

Operators in the Truck, Trailer and Motor Home Manufacturing industry produce motor vehicle bodies, truck trailers, motor homes and recreational vehicles (RVs). In recent years, rising trade tensions and the emergence of COVID-19 caused substantial demand decline for industry products. A reduction in demand in turn led to a decrease in industry revenue while supply chain disruptions caused by Russia's invasion of Ukraine led to further decrease in industry revenue. The onset of the pandemic caused industry demand to collapse temporarily but the operating environment quickly reversed given substantial fiscal stimulus and increasing consumer confidence. Over the past five years, revenue has been falling at an annual growth rate of 1.3% to an estimated $57.2 billion, despite a projected 1.8% increase in 2023 when profit will likely reach 1.8%.

Moving forward, the freight transportation services index will continue increasing, signaling a boost in sales at the manufacturing level. Additionally, the number of US residents aged 50 and older, who are RV manufacturers' main customer segment, will increase. As the overall economy recovers, customers financing big-ticket purchases will also increase, boosting demand from downstream truck, trailer and motor home dealers.

Industry profit is expected to improve, and industry operators will likely benefit from the USMCA trade agreement that was put in place to help protect auto manufacturing jobs from low-wage competition in Mexico and Canada. Mexico and Canada the largest source of imports and the only real source of import penetration by far. Proximity and favorable trade conditions between the three members make exportation favorable. Industry revenue is expected to increase at an annual growth rate of 1.5% to $61.6 billion over the next five years.

Fremont Industrial Development Site Viability Rating: 7

The industry is subject to numerous influences including interest rates, aging population, and world oil prices. Rising interest rates will hurt future sales as the customers' ability to borrow will be correspondingly limited. The Infrastructure Investment Act has helped to fund numerous Transportation infrastructure. Industry expectations include members of the Baby Boom generation moving towards a "RV lifestyle" which may increase sales. Oil prices are also influential as they will help to dictate disposable income and purchases of RVs, truck and related equipment. RVs and trucks are particularly fuel inefficient so when the price of fuel changes it is likely to have a significant impact on industry sales.

Lower labor costs could help to explain why recent manufacturers have outsources much of their manufacturing to Mexico. Industry products offer a low value to volume ratio making it more costly to transport these industry products overseas. The majority of buyers were likely to be located within North America. The Great Lakes region is home to the largest concentration of truck trailer manufacturing. More than one quarter of establishments are located there. This regions' operators benefit from the economic hubs of Chicago and Detroit. The Southeast hosts the second largest concentration of operators in this industry. This area is home to a large population providing a significant consumer base and potential workforce. The West Coast is home to the third largest concentration. This is due, in large part, to easy access to ports which use more trucks to move goods away or to these ports. This area is also home to a large consumer base and draws young and creative talent.

Purchases comprise approximately 2/3^{rds} of the industry's cost structure. The most important purchase within this industry is steel making it important to have access to and/or close proximity to this input large manufacturing operations account for 50% of market share. Substantial price of outputs and the complex nature of truck and motor home assembly limit the ability of smaller manufacturers to compete.

Access from the Fremont Industrial Development Site benefits from easy access to Highway 275 and the adjacent Union Pacific rail line. Furthermore, nearby connections to both Interstates 80 and 29 will benefit a potential user. The site is relatively free from both FEMA 100-year floodplain designation and identified wetlands thus increasing the ability to compile a large tract or tracts for potential development. Furthermore, the site is relatively flat, helping to simplify site development for a potential user.

Anticipated utility use ranges from moderate to low relative to estimated site capacity. Electrical power use will likely be a moderate user and should be implemented via 3-Phase lines with preference for redundant service. Water and Wastewater needs are expected to be low relative to estimated site capacity. Natural Gas need is moderate and should be provided via redundant services to ensure that access to never restricted. Telecommunications should be provided via fiber optic lines which will potentially require minimal extension of existing telecommunication lines.

Auto Parts Manufacturing in the US (33693)

Industry Definition

Companies in this industry manufacture and rebuild various motor vehicle parts and accessories. These parts include airbags, air conditioners, catalytic converters, exhaust systems, mufflers and resonators, radiators, radiator cores and wheels. Engines, tires, brakes, steering systems, interiors, suspensions, transmissions, and automotive electronics are not included in the industry.

Industrial Siting Considerations

- Critical Factors
    - Zoned for Industrial use with adequate buffers with conflicting uses
    - Access to trained workforce
    - Located outside of FEMA 100-year floodplain.
    - No major changes in elevation
    - Large tracts of contiguous developable land for large scale facilities

    - Moderate Electric load capacities with redundant capabilities preferred
    - Low Water Capacity
    - Low Wastewater Capacity
    - Moderate Natural Gas Capacity with redundant capabilities preferred
    - Fiber optic internet access

Key Siting Proximity Opportunities

- Proximity to raw materials
- Proximity to buying clusters
- Locate Near Transportation Network
    - Four-Lane Surface Transportation
    - Ports (preferably shipping)
    - Proximity to Rail Hub

Key Suppliers Industries

- Aluminum Manufacturing
- Paint Manufacturing
- Iron & Steel Manufacturing
- Textile Mills
- Inorganic Chemical Manufacturing

Key Buying Industries

- Car & Automobile Manufacturing
- Auto Parts Wholesaling
- Truck, Trailer & Motor Home Manufacturing
- Truck & Bus Manufacturing

Executive Summary

Auto parts manufacturers build multiple items, including exhaust systems, airbags, heating, ventilation, air conditioning systems (HVAC) and filtration devices. The industry faced major challenges during COVID-19, when social distancing significantly reduced travel and weakened manufacturing processes, resulting in a major decline in revenue. Mass vaccination in 2021 led to the relaxation of pandemic restrictions, which has spurred recreational activity through 2023. As more people drive because of increased outdoor fun, new car sales have risen, along with the need for repairs on vehicles resulting from more traveling. These factors have caused spending on auto parts for new and existing vehicles to rise, raising revenue for auto parts manufacturers.

Performance for the industry is threatened by the recent rise in interest rates, as a higher cost of borrowing will reduce car sales. Offshoring has also battered auto parts manufacturers, as low wages in developing countries and an appreciating US dollar have made it more expensive to produce car parts domestically. Overall, revenue for auto parts manufacturers has declined at an annual growth rate of 3.6% during the current period, reaching $66.8 billion in 2023, with revenue falling 1.2% in 2023 alone. Despite falling revenue, profits have risen to pre-pandemic levels.

Auto parts manufacturers will experience a resurgence during the outlook period. Stable economic growth and muted inflation will push consumer confidence and real incomes up, boosting revenue. Vehicles will also get older, which will increase the need for repairs on existing vehicles, raising performance for the industry in this segment. The dollar will depreciate, which will boost exports for auto parts manufacturers and reverse some of the offshoring that was occurring during the current period. Mass adoption of new innovations into vehicles will create more niche markets for auto parts manufacturers. Overall, revenue for auto parts manufacturers will increase at an annual growth rate of 1.0% during the outlook period, reaching $70.2 billion in 2028.

Fremont Industrial Development Site Viability Rating: 6

The Auto Parts Manufacturing Industry segment has benefited from recent legislation. The Infrastructure Investment Act has helped to fund numerous Transportation infrastructure. Furthermore, trump-era tariffs on Chinese auto parts and the renewed US-Mexico-Canada Agreement may increase the interest in manufacturers to produce these products in North America be eliminating some tariffs. Auto Parts Manufacturing refers to a wide range of potential facilities. As a result, a potential end user from this industrial segment could make use of a broad range of tract size, staging, buffering, and material or utility requirements. Nevertheless, reports from this industry indicate that facility construction requires high capital costs and that greater scales of economy will help generate a more reliable profit which favors the implementation of large facility construction. The intent of this report is to provide commentary on a larger facility or installation to promote a sense of readiness related to the necessary land and/or utility configuration to facilitate potential Auto Parts Manufacturing. The Great Lakes region is home to the largest 32concentration of domestic Auto Manufacturing. Foreign auto makers have tended to locate in the southeast. Additionally, California comprises a large consumer base for automobiles and has access to shipping lanes to the Pacific. Current measurements indicate that the cost of inputs or raw materials make up between half or two-thirds of the cost structure. Successful operators at the Fremont Site will need to secure contracts or affiliation with existing auto manufacturers or other related retailers. The strength of Unions in the workforce of this industry segment may make it difficult to adequately staff any subsequent facility.

Access from the Fremont Industrial Development Site benefits from easy access to Highway 275 and the adjacent Union Pacific rail line. Furthermore, nearby connections to both Interstates 80 and 29 will benefit a potential user. The site is relatively free from both FEMA 100-year floodplain designation and identified wetlands thus increasing the ability to compile a large tract or tracts for potential development. Furthermore, the site is relatively flat, helping to simplify site development for a potential user.

Anticipated utility use ranges from moderate to low relative to estimated site capacity. Electrical power use will likely be a moderate user and should be implemented via 3-Phase lines with preference for redundant service. Water and Wastewater needs are expected to be low relative to estimated site capacity. Natural Gas need is moderate and should be provided via redundant services to ensure that access to never restricted. Natural Gas capacity required will depend upon the end-users' need. Telecommunications should be provided via fiber optic lines which will potentially require minimal extension of existing telecommunication lines.

ADDENDUM 3
MARKET DEMAND SURVEY REPORT

Market Demand Survey Report

Detailed Volume Outlook by Commodity

The projected growth in rail volume comes from companies dealing in building materials, bulk liquids, and agricultural products. While not all projections are quantified, the available data indicates significant short-term and long-term increases.

Company	Commodity (Inferred)	Current Volume	Short-Term (1-2 Years) Outlook	Long-Term (3-5 Years) Outlook
Company "A"	Lumber	600 carloads/year	Increase to 800 carloads/year (+200 carloads)	Increase to 1,000 carloads/year (+400 from current)
Company "B"	Bulk Liquids (via tanker)	None	New operation: 4 tankers/week (~208 carloads/year)	Plan to increase tanker count beyond the initial 208/year.
Company "C"	Agricultural Products / Containerized Goods	None	Plan to increase volume and operational efficiencies.	Focus on growing network for loading ocean-going containers.
Total Quantified Outlook	---	**600+ carloads/year**	**An increase of at least 408 carloads/year**	**An increase of at least 608 carloads/year, plus unquantified growth.**

Overall, the quantified data alone points to a potential doubling of the current rail carload volume from these companies within the next five years, with further unquantified growth expected from the agricultural sector.

Categorization of Rail Service Solutions

The requested rail services can be grouped into three main categories: new infrastructure and capacity, improved service quality and access, and strategic partnerships.

1. Infrastructure and Capacity Solutions

This category includes the physical assets and facilities required to handle the projected volume growth. The most common request is for expanded transloading capabilities.

- **Transloading Facilities:** All three companies identified transloading as a key part of their strategy to increase capacity, improve throughput, and enable new service offerings.
- **Industrial Park Expansion:** Company "B" is explicitly considering locating or expanding within a dedicated industrial park to support its logistics needs.
- **Intermodal Capabilities:** Company "C" has a specific long-term interest in facilities capable of loading repositioned ocean-going containers, indicating a need for intermodal infrastructure.

2. Service Quality and Access Solutions
This category focuses on the operational aspects of rail service that determine its efficiency and cost-effectiveness. The primary concern is service reliability.

- **Consistent and Frequent Service:** Company "B" highlighted inconsistent transit times and service frequency as their most significant challenge, making reliable scheduling a critical need.

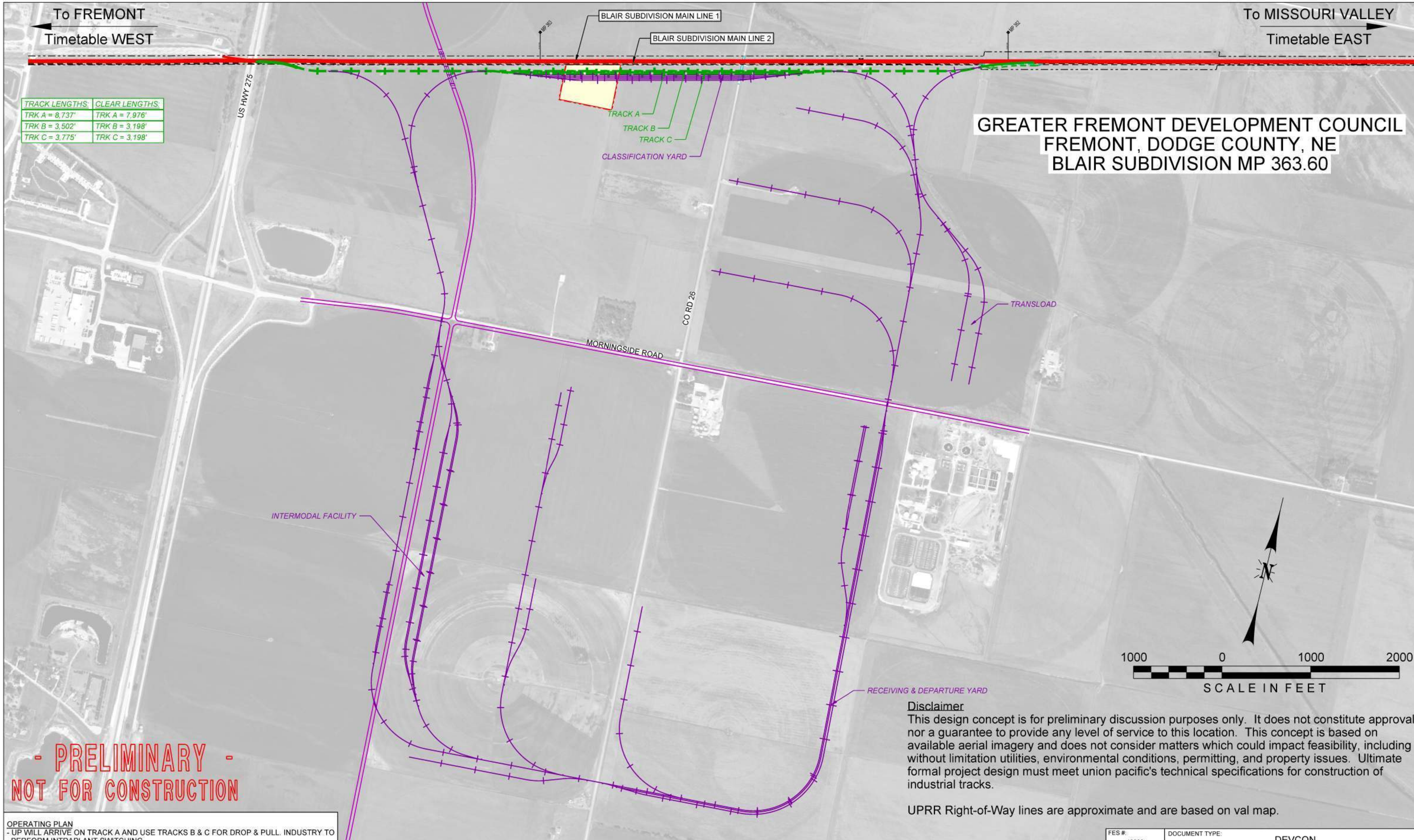
- **Competitive Rates:** Company "A" requires competitive rail rates to make expansion viable.

3. Strategic and Commercial Solutions
This category covers the high-level commitments and partnerships necessary to support long-term investment and growth.

- **New Service Offerings:** Companies are looking for rail partners to help create new and innovative logistics solutions.
- **Long-Term Stakeholder Commitments:** Company "C" emphasized that major new projects require firm, long-term commitments from all involved parties, including rail operators, developers, and public partners, to justify the investment.

4. Additional Inquiries
Since 2023, GFDC has fielded twenty-six inquiries on the site. Among those, thirteen inquiries indicated they had preference for nearby rail service opportunities or direct-rail service. Those thirteen inquiries represent a total potential investment of $8.9B.

ADDENDUM 4
INITIAL CONCEPTUAL LAYOUT
(DEVCON)



TRACK LENGTHS:	CLEAR LENGTHS:
TRK A = 8,737'	TRK A = 7,976'
TRK B = 3,502'	TRK B = 3,198'
TRK C = 3,775'	TRK C = 3,198'

GREATER FREMONT DEVELOPMENT COUNCIL
FREMONT, DODGE COUNTY, NE
BLAIR SUBDIVISION MP 363.60

Disclaimer

This design concept is for preliminary discussion purposes only. It does not constitute approval nor a guarantee to provide any level of service to this location. This concept is based on available aerial imagery and does not consider matters which could impact feasibility, including without limitation utilities, environmental conditions, permitting, and property issues. Ultimate formal project design must meet union pacific's technical specifications for construction of industrial tracks.

UPRR Right-of-Way lines are approximate and are based on val map.

- PRELIMINARY -
NOT FOR CONSTRUCTION

OPERATING PLAN
- UP WILL ARRIVE ON TRACK A AND USE TRACKS B & C FOR DROP & PULL. INDUSTRY TO PERFORM INTRAPLANT SWITCHING.

REV. #	BY	DATE	DESCRIPTION

Ex. UPRR Track	Shift Ind. Track	Hand Throw Turnout
Prop. UPRR Track	Future Ind. Track	Power Turnout
Remove UPRR Track	Prop. Leased Ind. Trk	Power Derail
Shift UPRR Track	Ex. Leased Ind. Trk	Hand Throw Derail
Ex. Ind. Track	No RR Operations	Point of Curve
Prop. Ind. Track	Other Ind. Track	Bridge
Remove Ind. Track	Right of Way	Signal

BURNS McDONNELL
9400 WARD PARKWAY
KANSAS CITY, MO 64114
816-333-9400
Burns & McDonnell Engineering Co, Inc.
Firm Reg. No. CA0621

UNION PACIFIC

FES #: 48303	DOCUMENT TYPE: DEVCON
DRAWN BY: H. MARDHEKAR	UNION PACIFIC RAILROAD — For use in Agreement with: GREATER FREMONT DEV. CO.
CHECKED BY: A. BROWN	LOCATION & DESCRIPTION:
DATE: 04/07/25	FREMONT, DODGE COUNTY, NE - BLAIR SUB MP 363.60 Trackage to Serve: Greater Fremont Development Council
SHEET NUMBER 001 of 026	SHEET TITLE: PLAN OVERVIEW

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OVERALL DEV GFDC - Plan 3 [Sheet]
4/8/2025

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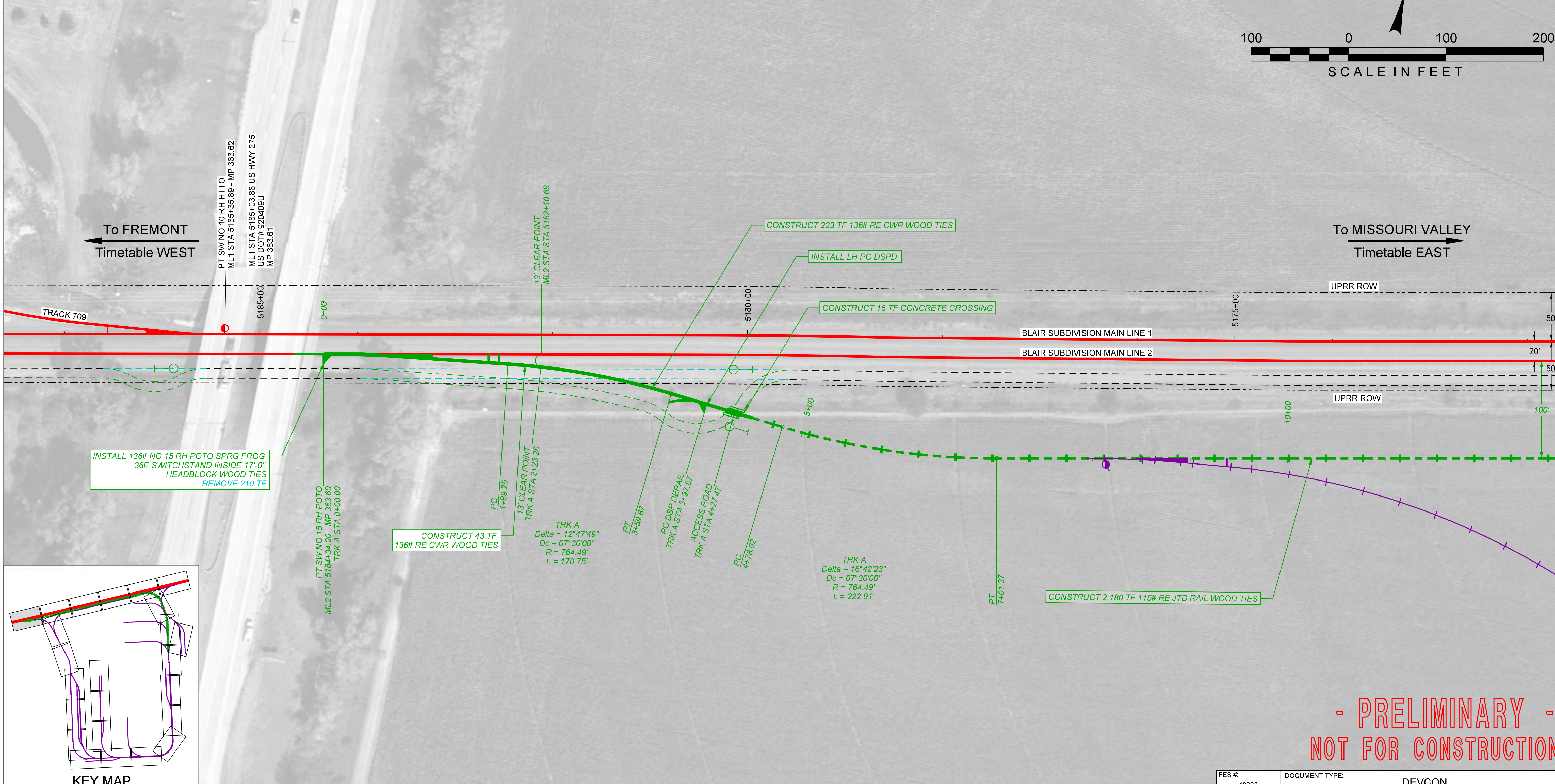

REV. #	BY	DATE	DESCRIPTION

Ex. UPRR Track	Shift Ind. Track	Hand Throw Turnout	
Prop. UPRR Track	Future Ind. Track	Power Turnout	
Remove UPRR Track	Prop. Leased Ind. Trk	Power Derail	
Shift UPRR Track	Ex. Leased Ind. Trk	Hand Throw Derail	
Ex. Ind. Track	No RR Operations	Point of Curve	
Prop. Ind. Track	Other Ind. Track	Bridge	
Remove Ind. Track	Right of Way	Signal	

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FES #: 48303
DOCUMENT TYPE: DEVCON
DRAWN BY: H. MARDHEKAR
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For use in Agreement with: GREATER FREMONT DEV. CO.
CHECKED BY: A. BROWN
LOCATION & DESCRIPTION:
DATE: 04/07/25
FREMONT, DODGE COUNTY, NE - BLAIR SUB MP 363.60
Trackage to Serve: Greater Fremont Development Council
SHEET NUMBER 003 of 026
SHEET TITLE: PLAN SHEET 1

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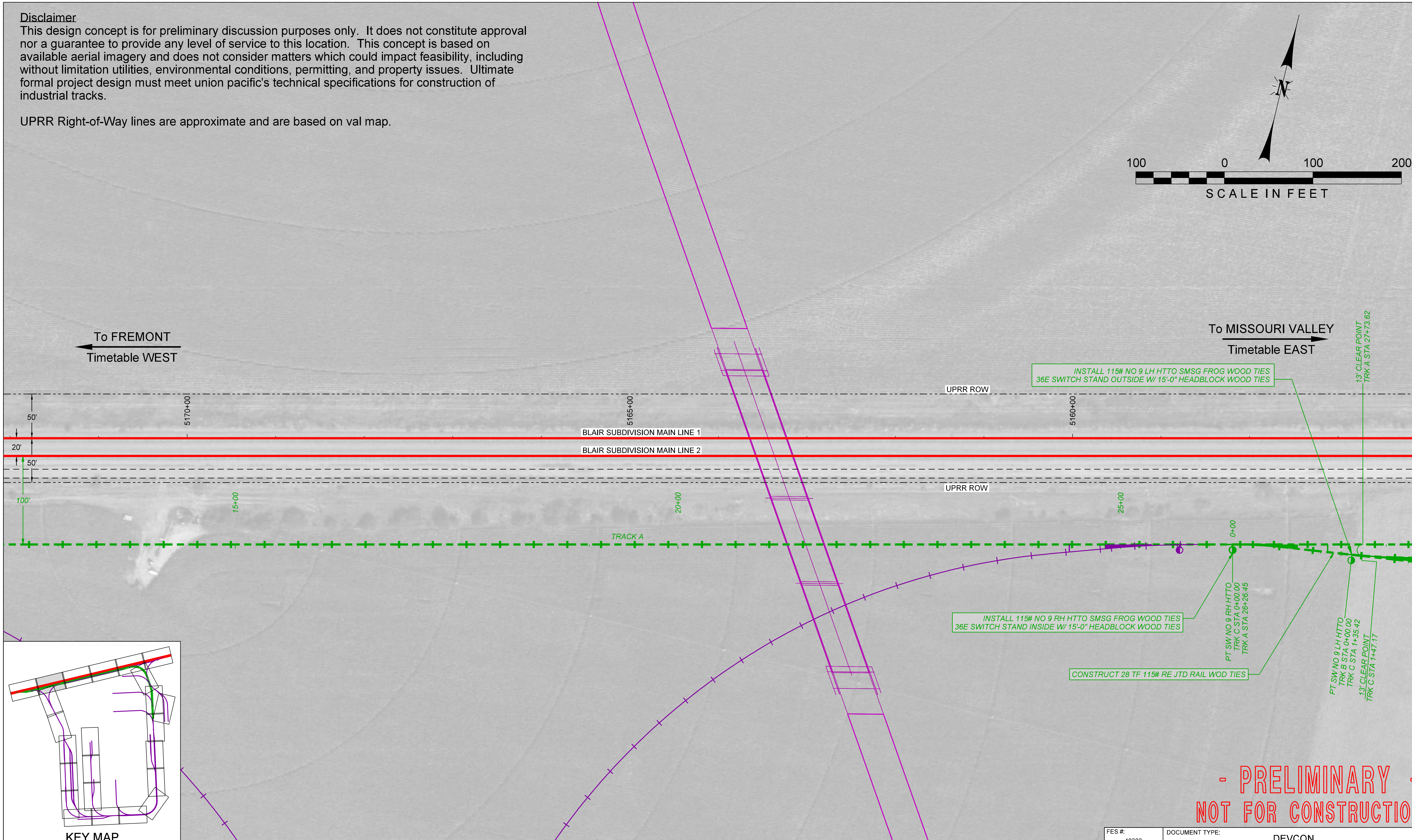
UPRR Right-of-Way lines are approximate and are based on val map.



REV. #	BY	DATE	DESCRIPTION

Ex. UPRR Track
Prop. UPRR Track
Remove UPRR Track
Shift UPRR Track
Ex. Ind. Track
Prop. Ind. Track
Remove Ind. Track
Shift Ind. Track
Future Ind. Track
Prop. Leased Ind. Trk
Ex. Leased Ind. Trk
No RR Operations
Other Ind. Track
Right of Way
Hand Throw Turnout
Power Turnout
Power Derail
Hand Throw Derail
Point of Curve
Bridge
Signal

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SHEET TITLE: PLAN SHEET 2

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DevCon GFDC - Plan 2 [Sheet]
4/8/2025

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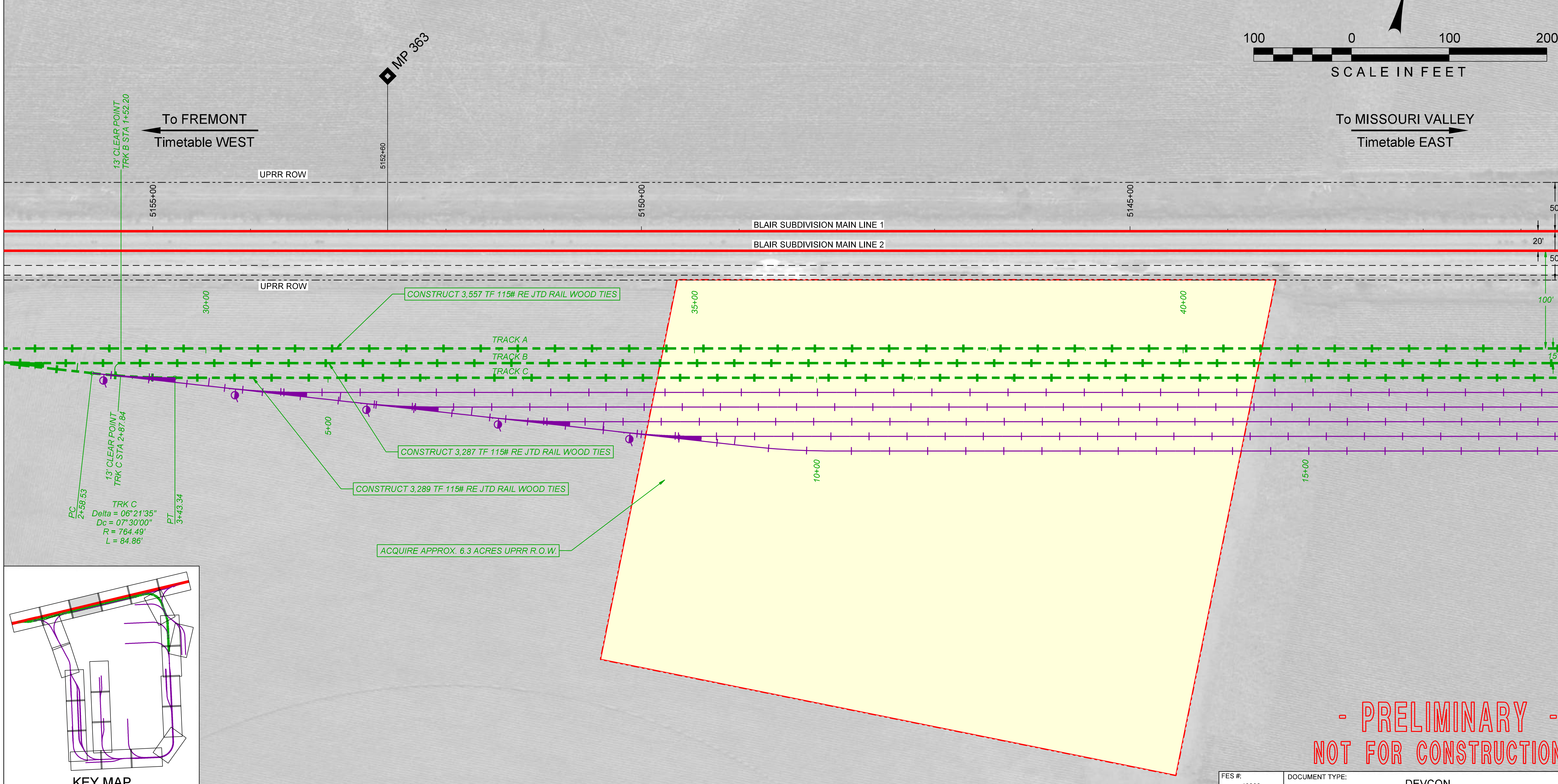

REV. #	BY	DATE	DESCRIPTION

Ex. UPRR Track	Shift Ind. Track	Hand Throw Turnout
Prop. UPRR Track	Future Ind. Track	Power Turnout
Remove UPRR Track	Prop. Leased Ind. Trk	Power Derail
Shift UPRR Track	Ex. Leased Ind. Trk	Hand Throw Derail
Ex. Ind. Track	No RR Operations	Point of Curve
Prop. Ind. Track	Other Ind. Track	Bridge
Remove Ind. Track	Right of Way	Signal

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SHEET NUMBER 005 of 026	SHEET TITLE: PLAN SHEET 3

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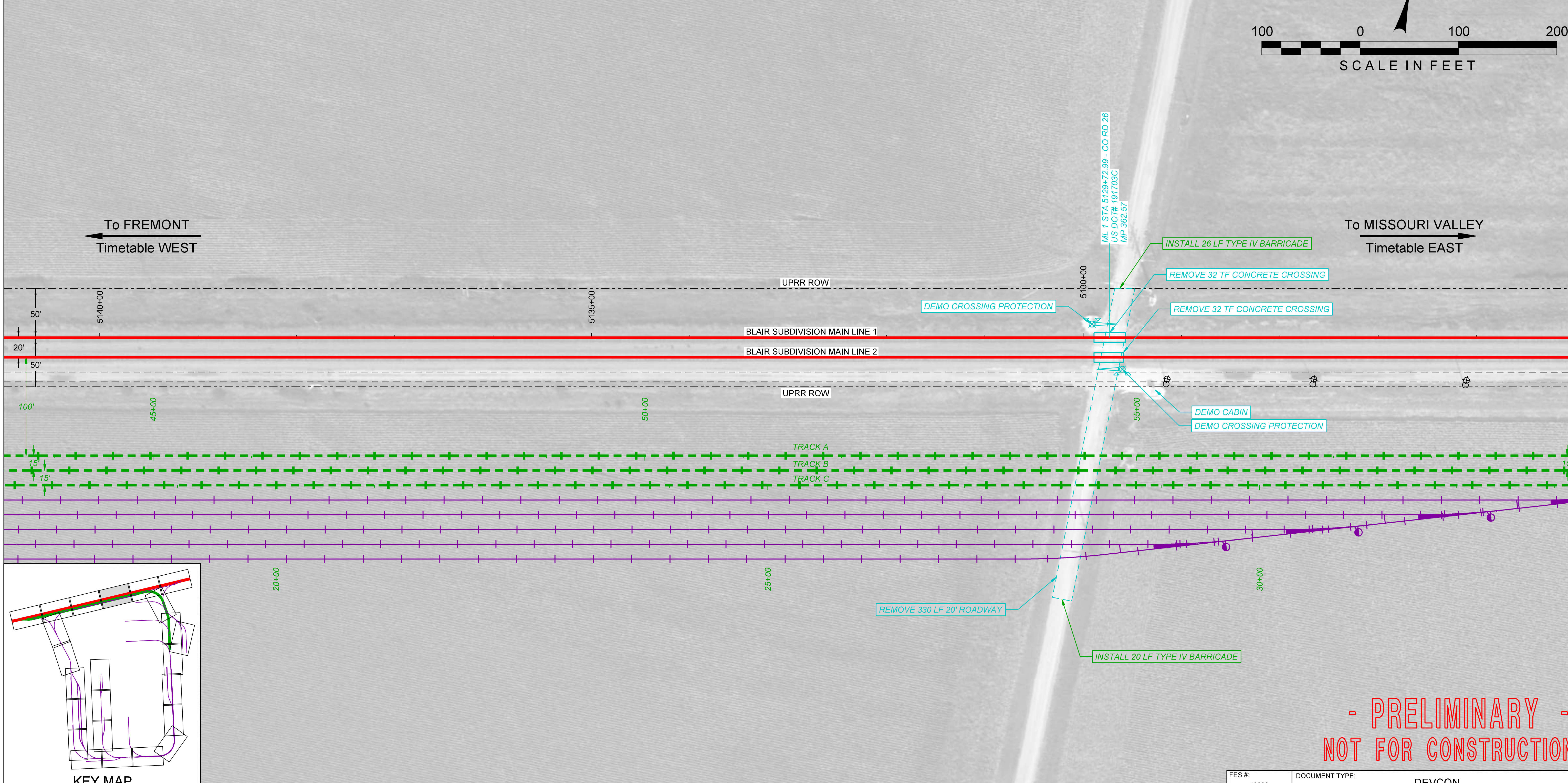

- PRELIMINARY -
NOT FOR CONSTRUCTION

REV. #	BY	DATE	DESCRIPTION

Ex. UPRR Track
Prop. UPRR Track
Remove UPRR Track
Shift UPRR Track
Ex. Ind. Track
Prop. Ind. Track
Remove Ind. Track
Shift Ind. Track
Future Ind. Track
Prop. Leased Ind. Trk
Ex. Leased Ind. Trk
No RR Operations
Other Ind. Track
Right of Way
Hand Throw Turnout
Power Turnout
Power Derail
Hand Throw Derail
Point of Curve
Bridge
Signal

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SHEET NUMBER 006 of 026
SHEET TITLE: PLAN SHEET 4

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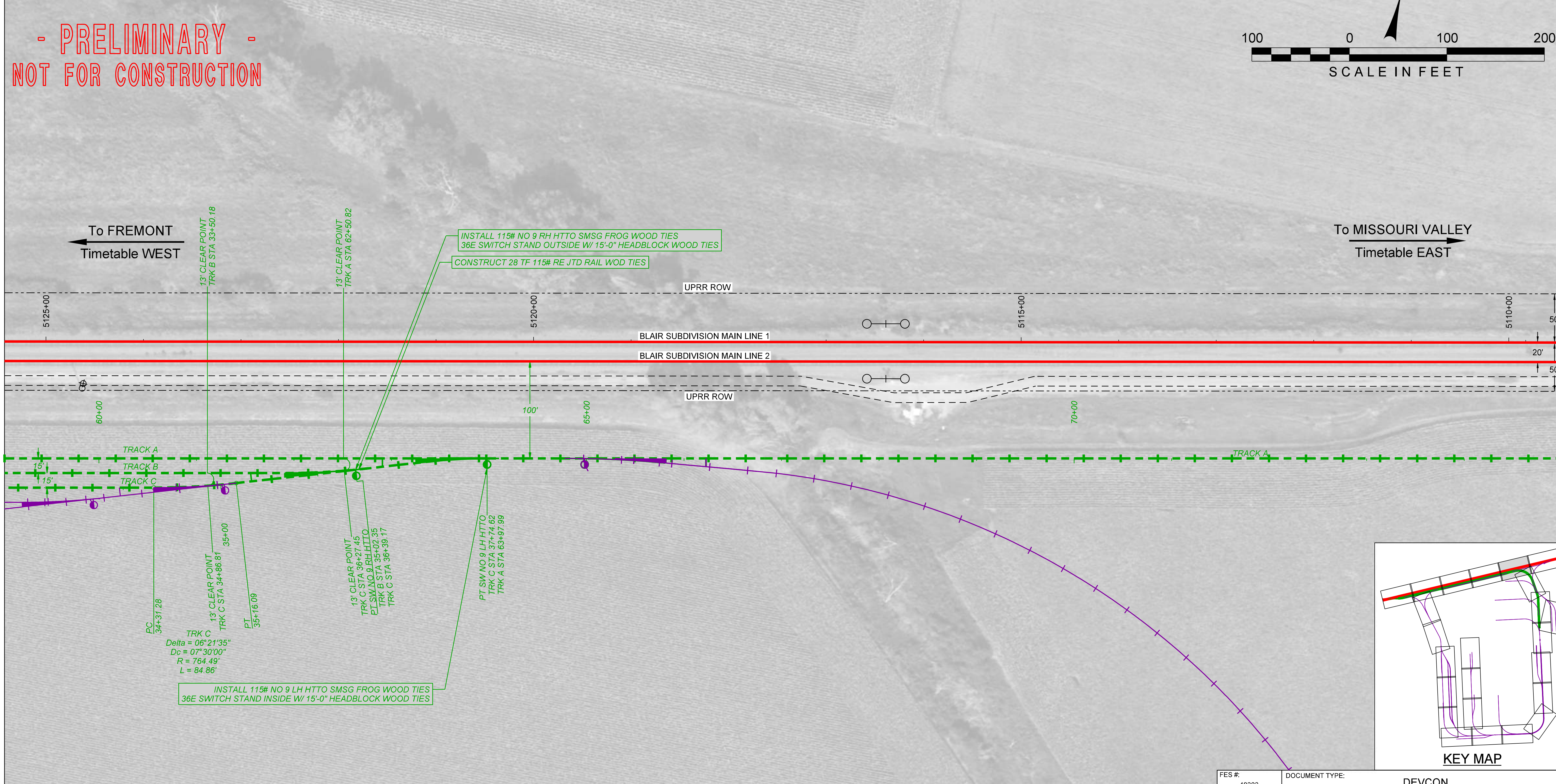

REV. #	BY	DATE	DESCRIPTION

Ex. UPRR Track
Prop. UPRR Track
Remove UPRR Track
Shift UPRR Track
Ex. Ind. Track
Prop. Ind. Track
Remove Ind. Track
Shift Ind. Track
Future Ind. Track
Prop. Leased Ind. Trk
Ex. Leased Ind. Trk
No RR Operations
Other Ind. Track
Right of Way
Hand Throw Turnout
Power Turnout
Power Derail
Hand Throw Derail
Point of Curve
Bridge
Signal

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Trackage to Serve: Greater Fremont Development Council
DATE: 04/07/25
SHEET NUMBER 007 of 026
SHEET TITLE: PLAN SHEET 5

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DevCon_GFDC - Plan 5 [Sheet]
4/8/2025

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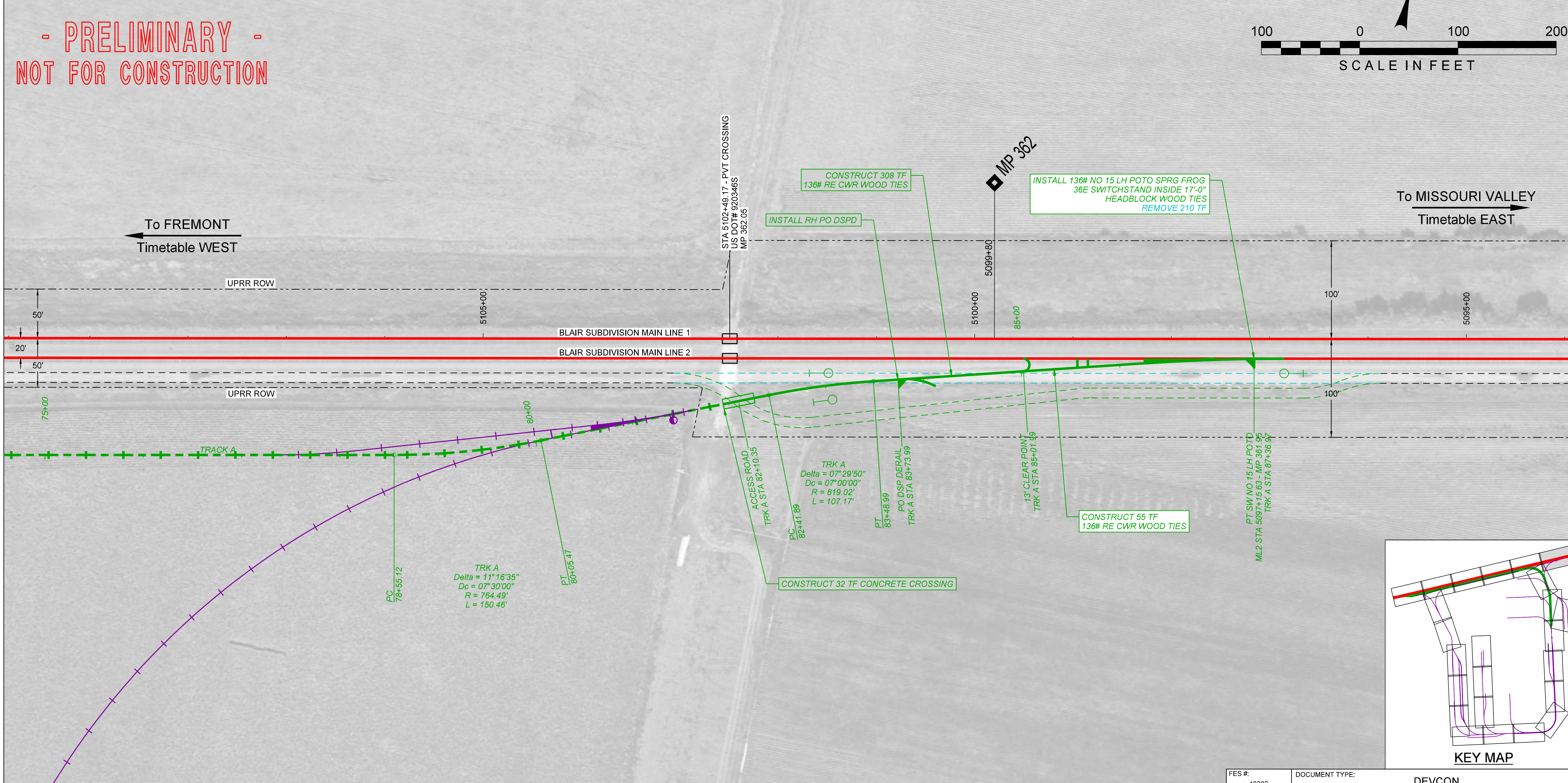

REV. #	BY	DATE	DESCRIPTION

Ex. UPRR Track	Shift Ind. Track	Hand Throw Turnout
Prop. UPRR Track	Future Ind. Track	Power Turnout
Remove UPRR Track	Prop. Leased Ind. Trk	Power Derail
Shift UPRR Track	Ex. Leased Ind. Trk	Hand Throw Derail
Ex. Ind. Track	No RR Operations	Point of Curve
Prop. Ind. Track	Other Ind. Track	Bridge
Remove Ind. Track	Right of Way	Signal

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SHEET NUMBER 008 of 026
SHEET TITLE: PLAN SHEET 6

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4/8/2025