GREATER HOUSTON PARTNERSHIP.







GREATER HOUSTON PARTNERSHIP.





Greater Houston Partnership

Making Houston the best place to live, work and build a business.

Serves the 12-county Greater Houston region

Represents more than 1,000 businesses and institutions

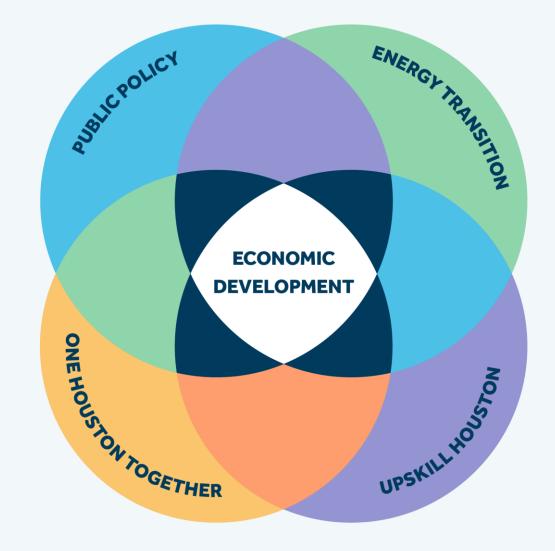
Members accounts for one-fifth of Houston's workforce

Promotes economic development and trade

Advocates for effective public policy

Convenes Houstonians on key issues

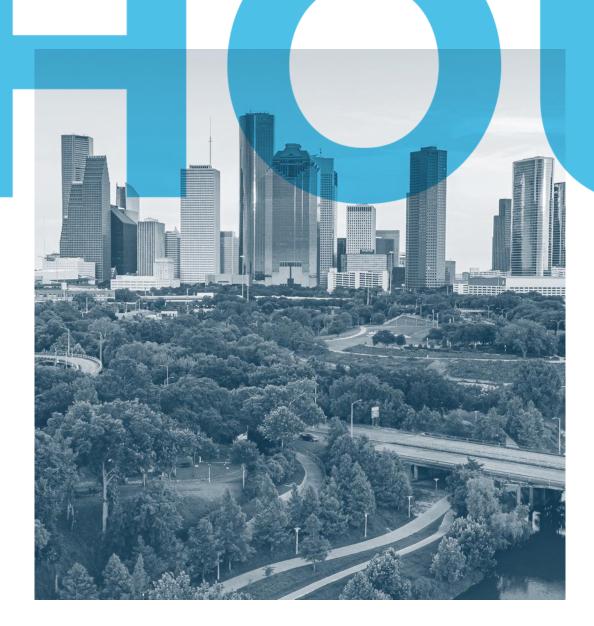
BOARD OF DIRECTORS & GENERAL MEMBERSHIP





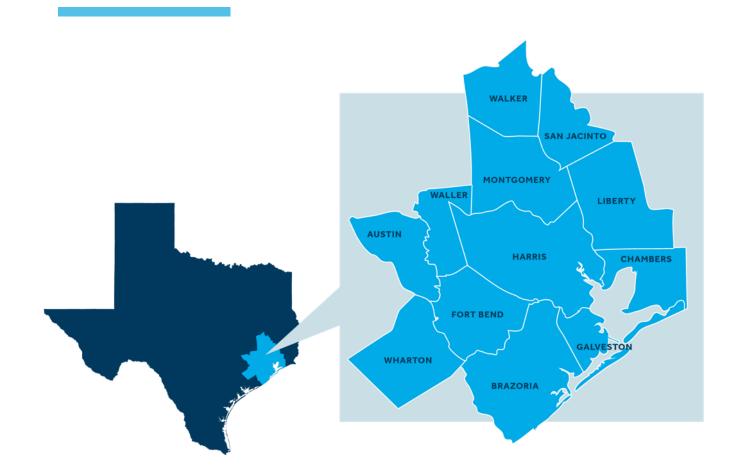
Deep in the Heart of Texas, Connected to the World.

Houston is big, but friendly. We are growing and welcoming. We are internationally connected and globally diverse. We are Houston.





Major Metro, Major Opportunity



4th Largest U.S. city

MillionMetro population

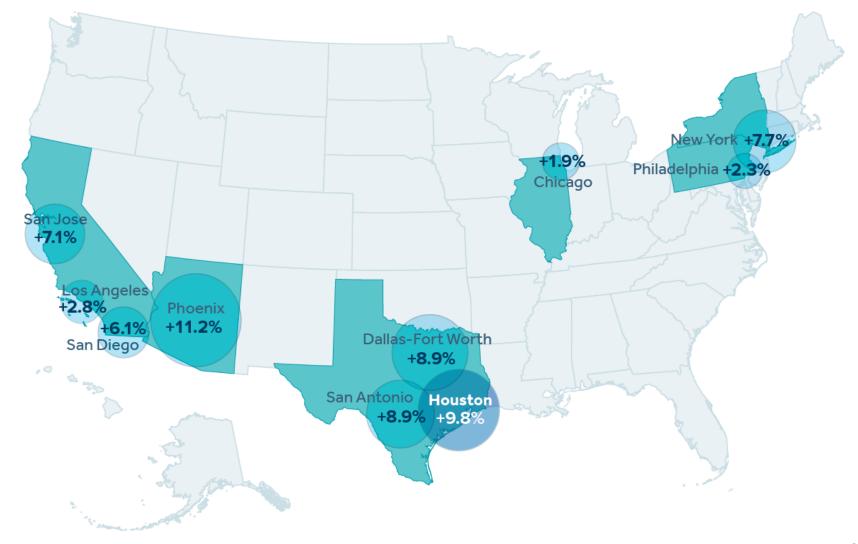
Million Jobs (up 15.6%'10-'20)





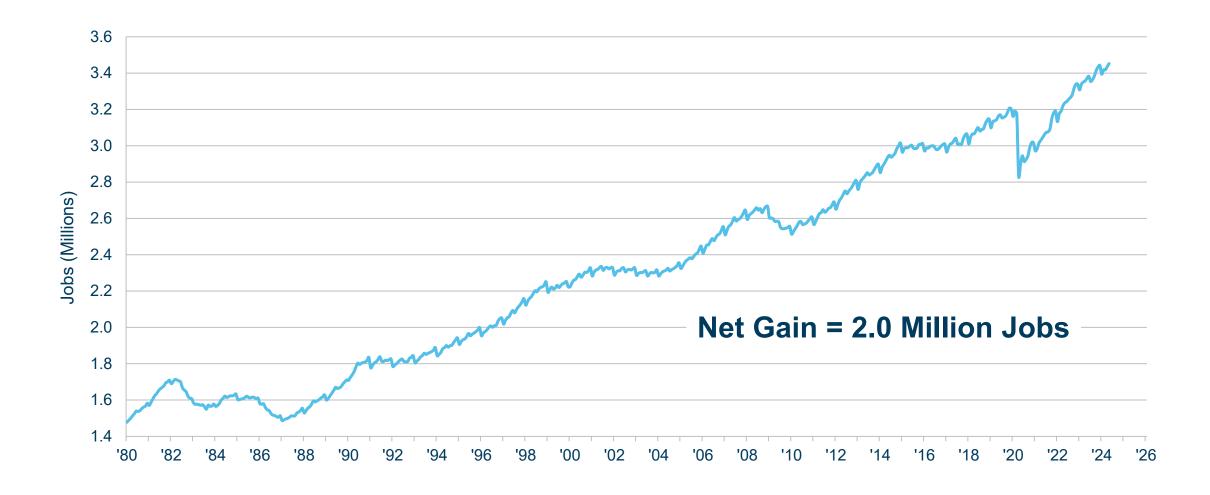
The World is Moving to Houston

Among America's Fastest Growing Metros



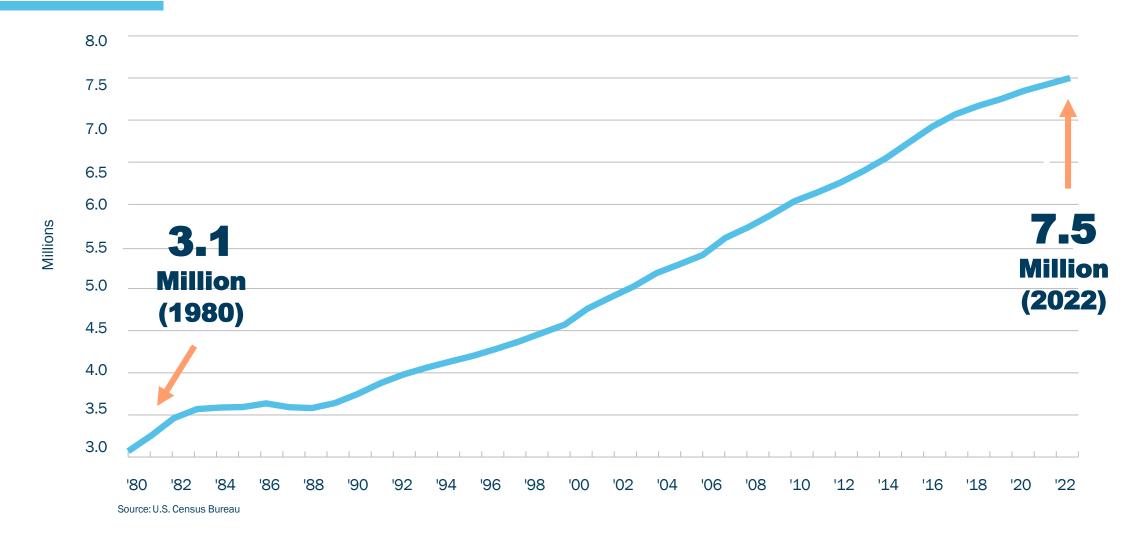


Metro Houston Employment





Metro Houston Population Growth

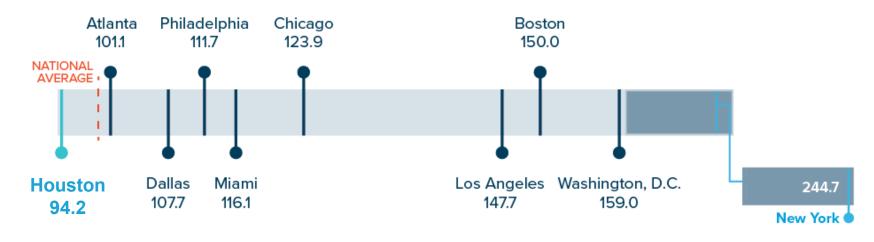




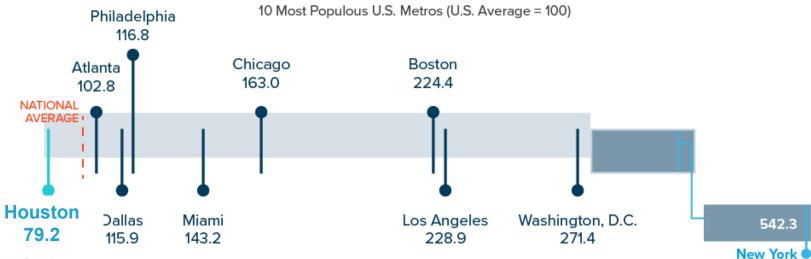
Low Cost of Living

COST OF LIVING COMPARISON

10 Most Populous U.S. Metros (U.S. Average = 100)



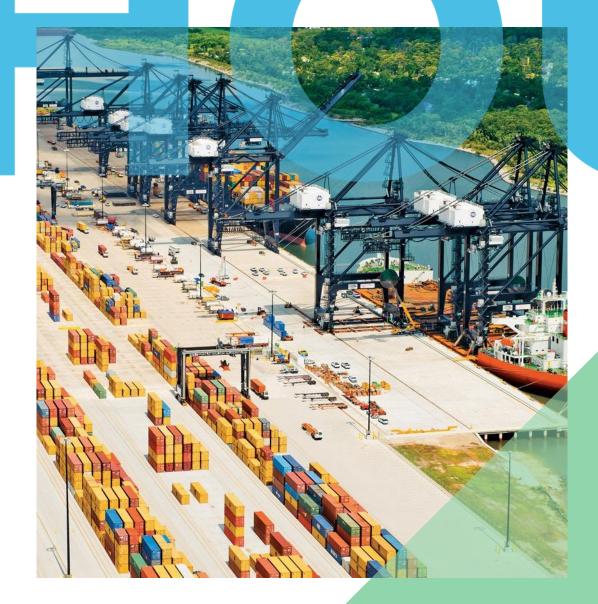
HOUSING COST COMPARISON





Access the World from Houston.

Business opportunities know no borders. In Houston, there are no barriers to connect with global markets and talent.





Unparalleled Global Access



Equidistant

to east and west coasts

180 NON-STOP destinations from two international airports

Direct flights to **5 Continents**

37 Countries with direct service from Houston



Doing Business Around the World



#1

U.S. City for International Business (Financial Times, 2024)

5,000

Houston entities involved in international business

110

Houston-based companies operate in 110 foreign nations

86

Countries with active consular representation

19

Sister cities across 5 continents



World Class Infrastructure



U.S. Port by tonnagePort of Houston

International Airports
only Texas city | 1 of 8 cities nationwide

273 Metric tons of foreign trade Houston region seaports '24

Class 1 Railroad Carriers UP, BNSF and KCS



TEXAS

Premier Business Environment

We work together to help your business succeed.

#1
Doing Business
CEO Magazine

#1New & Expanded

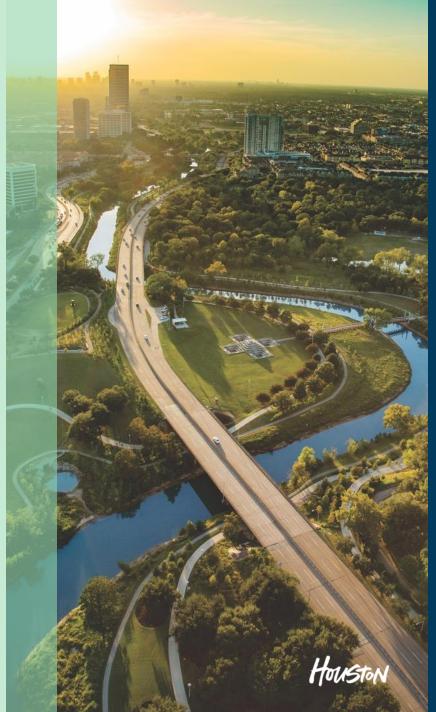
Corporate Facilities

Site Selection Magazine

0%
Income Tax
Personal & Corporate

Fastest Growing

Population Growth (6 million added since 2010)



Equidistant to East and West Coast

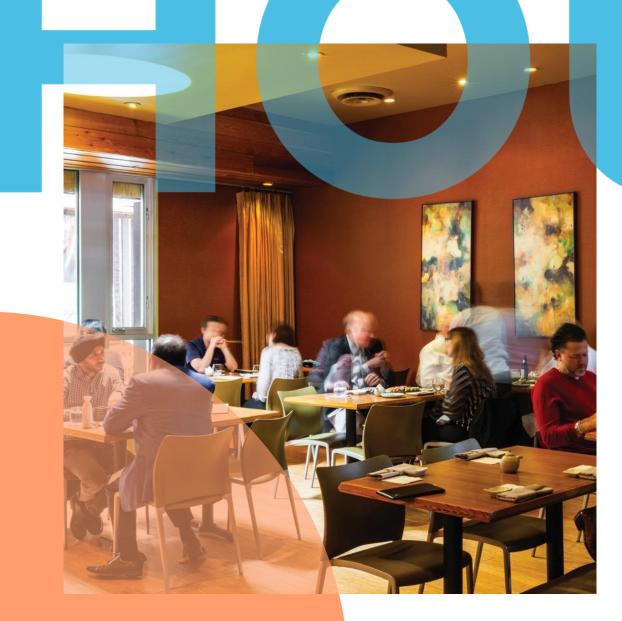




Together

We connect people and opportunity, creating energy you won't find anywhere else.

Our culture, at its very core, is an intersection of global ideas, innovation and opportunity.





The Entire World in a City

America's Most Diverse City.

1 in 4
Houstonians are foreign born

145+
Languages
are spoken

30%International workforce

#1City for International Business
(Financial Times-Nikkei, 2024)



Attracting a Dynamic Workforce

400,000+

Educated millennials

35.7

Median age
youngest major metro

243,900 Employed in tech sector

8th
Largest LGBTQ
population in U.S.



Producing Top Talent

Nationally Ranked Universities and Colleges

Universities & Colleges (two-year and four-year)

443,000+ Students enrolled '24

Largest Universities







HBCUs





Community Colleges









K-12 Education in Houston

64

Houston-area Independent School Districts (ISDs) & Charter Management Organizations

A-Rated Districts
Best School Districts—
niche.com. 2024

1.3M

Students enrolled in ISDs & charter schools

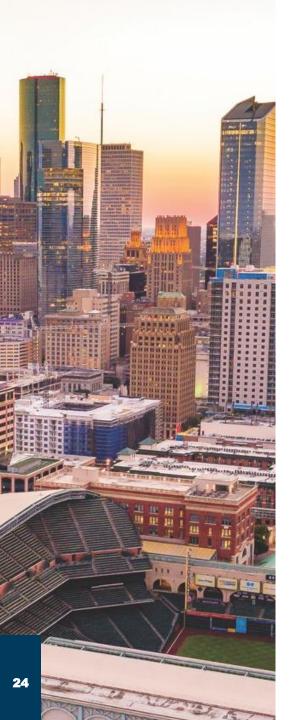


An Exceptional Place to Live

Houstonians enjoy the cultural, recreational and entertainment amenities of a big city, but at a cost of living well below the national average.







A Great Place to Live

Among the country's most

Exciting Food Cities

13,200+ restaurants | 650 bars | 70 countries

Major League

Sports Town











Among the country's

Greenest Cities

500 mi. of bikeways | 627 parks | 167+ green spaces

#4 in U.S. for Parks Space

Among the country's most

Visited & Diverse

cultural centers

The Houston Museum District | 19 world-class museums

World Renowned

Performing Arts

theater | dance | music | ballet

Houston Theater District | 17-block area Downtown

#1 in U.S.

Total contributions in charitable giving



A Vibrant Culinary Destination

26+Michelin Recognized Restaurants

7+
James Beard Award
Winning Chefs

13K+
Restaurants

2022
Host of primetime award winning
Top Chef series

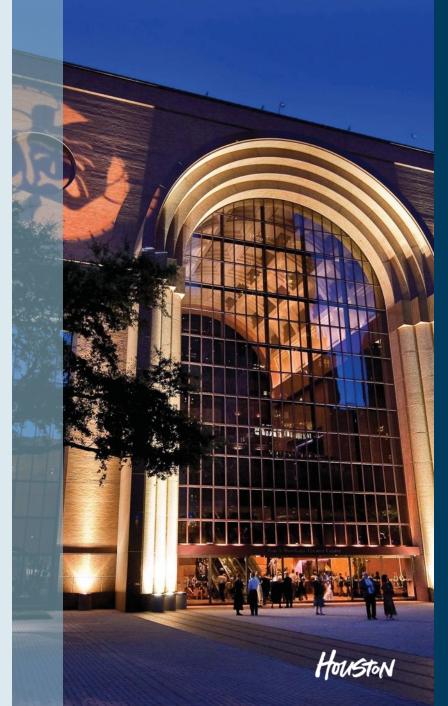


Experience the Arts in Houston

\$800M
Invested in museum district since '18

18+
Museums in
Museum District

Institutions devoted to performing and visual arts, science and history



GREEN SPACES, BIG CITY.

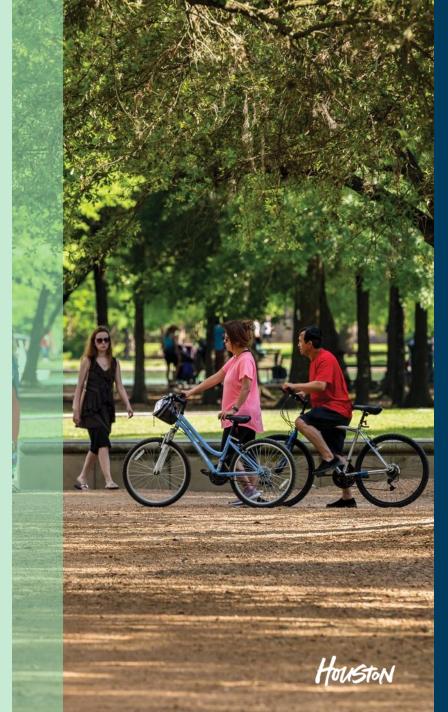
Houston's Outdoor Advantage

500+Miles of bikeways

720+Houston parks

45,000+
Acres of park space

#4
In U.S. for park space



A City Built for Sports Fans

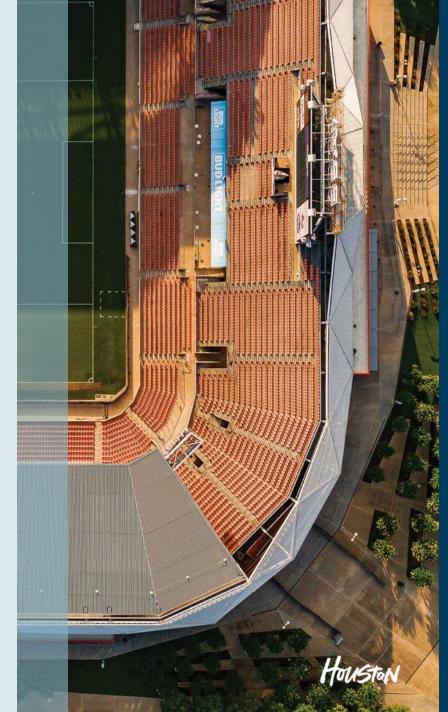












A Host City

World Cup (2026)

Super Bowl

Final Four

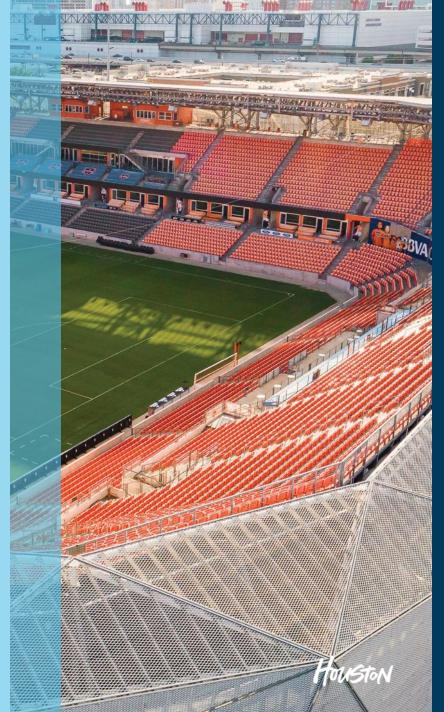
World Baseball Classic

PGA Tour's Houston Open

Texas Bowl

Houston Livestock Show and Rodeo

H-Town Half
Marathon 10K & 5K
at Daikin Park



Year-Round Outdoor Activities

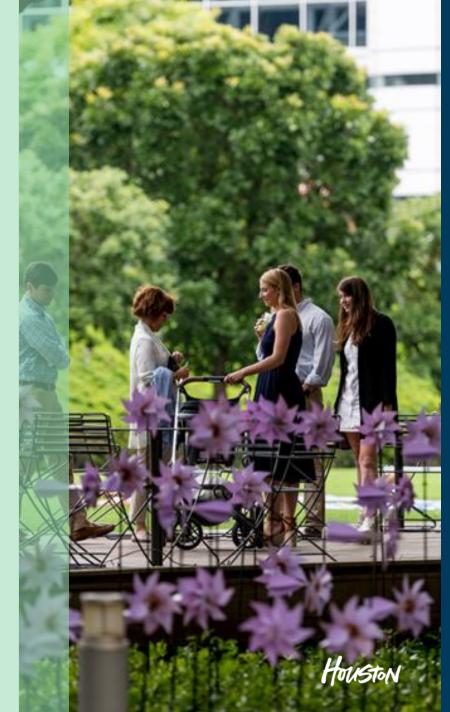
70.5 Avg. temperature

0.10Annual snowfall

165Golf courses

50+Outdoor festivals

3rd
Largest recreation boating community in U.S.



A Strong, Diverse 21st Century Economy

Houston is an economic powerhouse with leading positions across key global industries.

Diverse Industry Sectors

We are a Top Global Business Destination



Energy



Life Sciences



Aerospace & Aviation



Advanced Manufacturing



Digital Technology

Fortune 500
Corporate
headquarters

Fortune 1000
Corporate
headquarters

Inc 1000
Corporate headquarters



21

Fortune 500 energy corporate headquarters

Energy
Capital of the World

4,200+

Energy firms located in Houston

220,000+

Energy professionals in the Houston region

1/3

Regional GDP comes from the Energy sector

7,200+

manufacturing establishments in the Houston region

An Advanced Manufacturing Powerhouse

238,000+

manufacturing workforce (one of the largest in the U.S.)

\$106B

in goods produced annually ('23)

Diverse Markets

aerospace | automotive | biotechnology | energy equipment controls | instrumentation



5,600+

transportation & warehousing establishments

Trade and Logistics Hub

1,000+

logistics service providers, customs brokers and 3PLs

149,000+

logistics workers transportation & warehousing

Growing Base

distribution- logistics centers



HOUSTON
Life Sciences &
Biotechnology

\$2B

In life sciences research annually

TMC

Home to the world's largest medical center

1,100

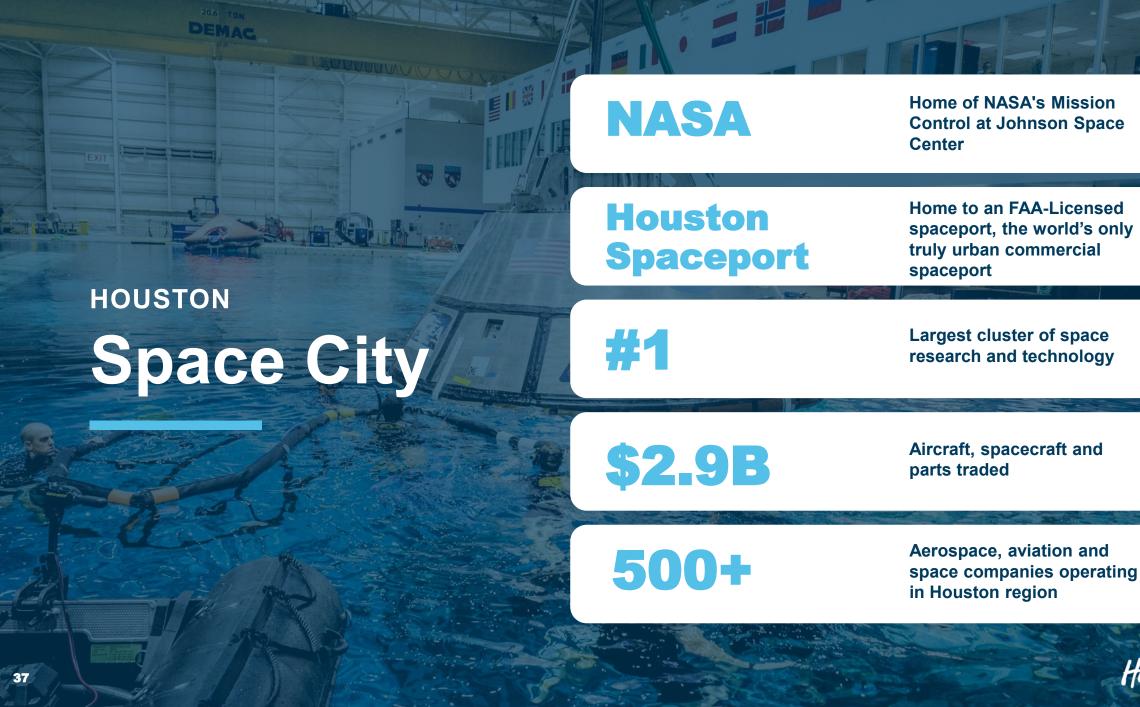
Life sciences and biotech companies

\$2B

In state funding over 20 years for cancer related projects

8M

Square feet of life sciences space



Houston

2

International Airports

HOUSTON

Aviation

63.1M

Passengers annually

180+

Non-stop destinations

35+

Over 35 general aviation airports

9,100

Tech-related firms

Digital
Technology

20,000

Software developers

155,000

Net Tech Workforce

\$21.2B

Tech-Sector Impact on the Economy



66

Houston is the logical choice for World Energy's Aviation Zero plant two. Not only does our positioning here provide unparalleled finished product access but provides tremendous access to global feedstocks, emerging sources of low-carbon hydrogen, and even access to captured carbon to advance commercialization of innovative new processes for the production of SAF. We've been operating here in various capacities nearly two decades and we recognize why Houston is the beating heart of America's energy complex.

Gene Gebolys

CEO, World Energy



Houston's deep ties to the energy sector—especially in drilling, completions, and geosciences—align closely with what it takes to bring enhanced geothermal to market. Beyond technical talent, Houston offers a deep bench of professionals with energy sector experience, from supply chain specialists to legal and finance experts, who understand how to scale an energy business. With roughly half of our employees based here, being part of this ecosystem has been invaluable in growing our company.

Tim Latimer

CEO, Fervo Energy





Houston is the logical choice for World Energy's Aviation Zero plant two. Not only does our positioning here provide unparalleled finished product access but provides tremendous access to global feedstocks, emerging sources of lowcarbon hydrogen, and even access to captured carbon to advance commercialization of innovative new processes for the production of SAF. We've been operating here in various capacities nearly two decades and we recognize why Houston is the beating heart of America's energy complex.

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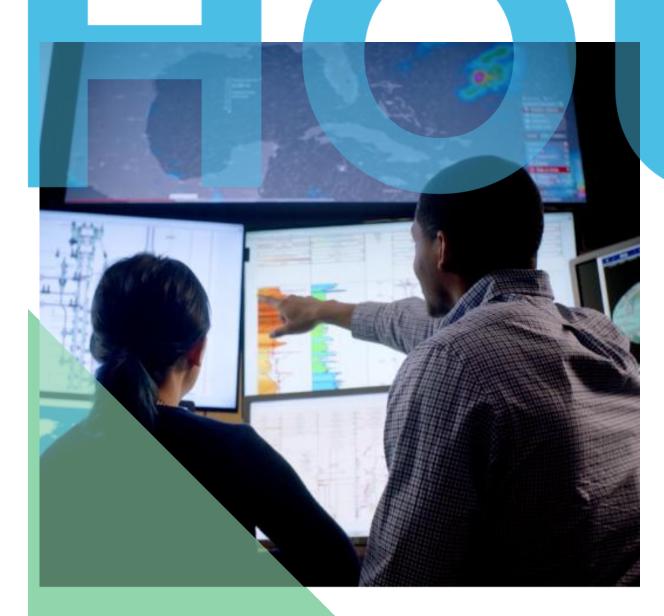
CEO, World Energy



HOUSTON

The Energy Capital of the World

Houston, long known as the Energy Capital of the World, is now driving the future with cutting-edge innovation in renewables, hydrogen, carbon capture, and clean tech solutions shaping a more sustainable global energy landscape.





Energy Capital of the World

With a wealth in experience and an innovative spirit, Houston has the knowledge and resources to power the world's energy ecosystem for today and the future.

21

Fortune 500 Energy HQs

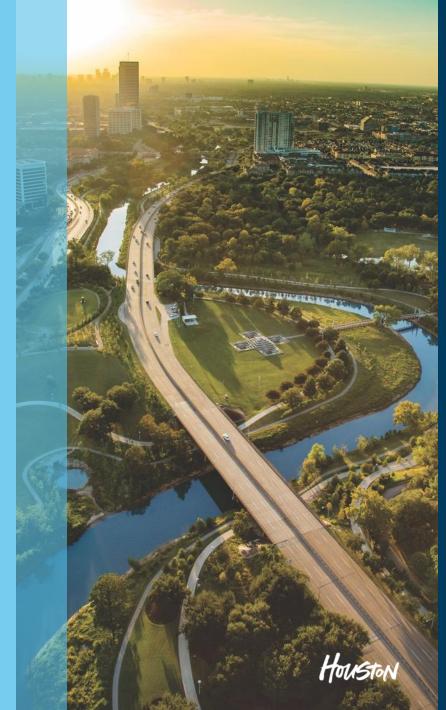
4,200+

Energy firms in Houston

220,000

Energy professionals in Houston

1/3
Of Houston's GDP



The Top Destination for Energy Headquarters

Houston is home to 20 Fortune 500 energy companies.











































Houston Energy Transition Initiative

A Steering Committee composed of 23 founding companies guides HETI's efforts.

















































A Booming Energy Innovation Ecosystem

80+ tech companies focused on Energy

50+ startup incubators focused on Energy

\$6.1 B energy transition private investment funding (2022)



chevron technology ventures

















Large Base of Low-Carbon Energy Companies

150+ Solar Related companies











40+ Wind Related companies











80+ Digital Tech in energy

Data Analytics | Remote Sensing | Cloud Processing | Al & ML





"Houston's deep ties to the energy sector—especially in drilling, completions, and geosciences—align closely with what it takes to bring enhanced geothermal to market. Beyond technical talent, Houston offers a deep bench of professionals with energy sector experience, from supply chain specialists to legal and finance experts, who understand how to scale an energy business. With roughly half of our employees based here, being part of this ecosystem has been invaluable in growing our company."

Tim Latimer

CEO, Fervo Energy



Economic Development

February **February**

Vestas.

Vestas, a global leader in wind turbine manufacturing, opened a new corporate office in Downtown Houston (609 Main). The project will create 100 jobs with \$2M in capital investment.





HOUSTON

Life Sciences and Biotechnology

From curing cancer to developing life-saving diagnostics and preventive interventions, Houston's world-class research institutions, and innovative companies are taking on the greatest medical challenges of our time.



ABB Robotics / Texas Medical Center Innovation Institu



HOUSTON

The brightest Minds in STEM

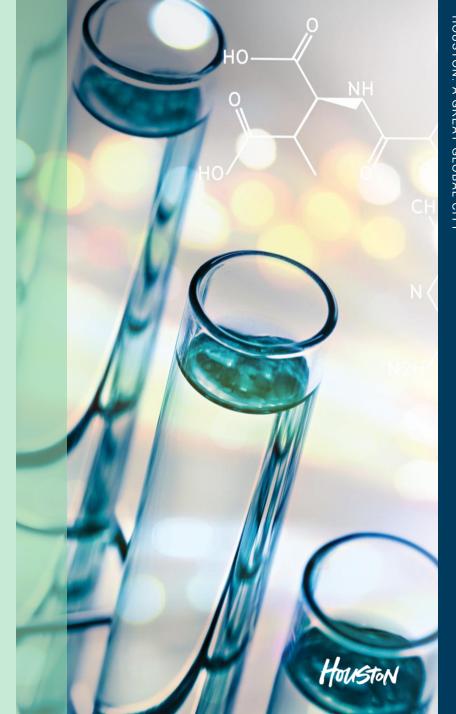
28,000+ **Core Life Science Industry Employees**

15,400+ Life Science and **Biotech Researchers**

3,000+ Biomed,

Bioengineering, and **Pharma Science Degrees Awarded** Regionally ('20)

Sources: GHP Research 2023



Healthy Base of Companies in the Region

Houston is home to 1,100 life sciences and biotech companies.















































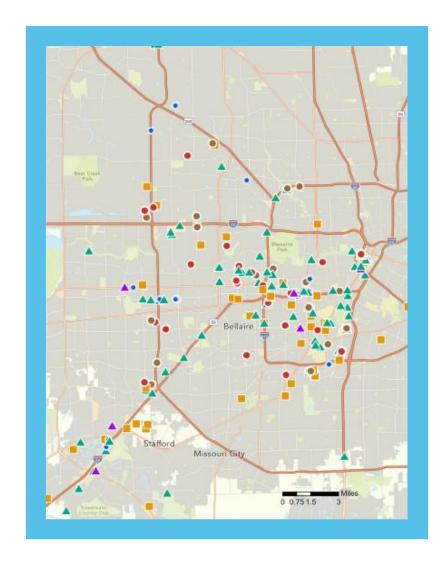








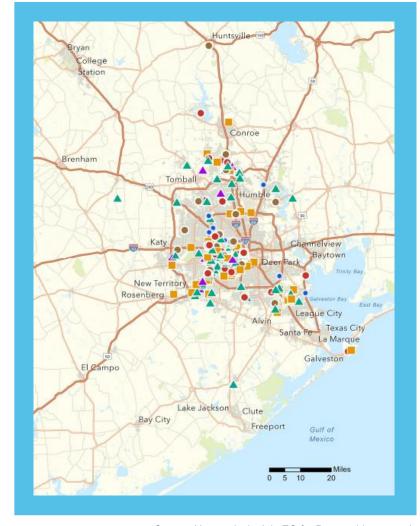
Houston Bio Companies



Houston Bio Companies

Primary Segment

- AgroSciences
- Biotechnology Distribution
- Drugs & Pharmaceuticals
- Medical Device & Equipment
- Medical Technology
- Testing &
- Analytical Services
- Not Available



Source: Newmark via JobsEQ for Partnership research



Pharma and Medicine Manufacturing

Houston is home to a growing biotech manufacturing industry cluster and boasts a large relevant process-oriented production workforce in other industries with relevant transferrable skill sets into biomanufacturing careers.

Rank	Metro Statistical Area (MSA)	Target Employment	Total Employment	Target Employmen t Concentration	Target Talent Location Quotient
1	New York-Newark-Jersey City NY-NJ-PA	36,310	8,678,110	0.42%	1.1
2	Boston-Cambridge-Nashua MA-NH	21,930	2,585,140	0.85%	2.3
3	Philadelphia-Camden- Wilmington PA-NJ-DE-MD	19,440	2,654,680	0.73%	2.0
4	Houston-The Woodlands- Sugar Land TX	17,450	2,897,060	0.60%	1.6
5	Chicago-Naperville-Elgin IL-IN-WI	16,760	4,232,830	0.40%	1.1
6	Los Angeles-Long Beach- Anaheim CA	15,260	5,719,620	0.27%	0.7
7	San Francisco-Oakland- Hayward CA	15,200	2,242,190	0.68%	1.8
8	Washington-Arlington- Alexandria DC-VA-MD-WV	12,230	2,932,600	0.42%	1.1
9	San Diego-Carlsbad CA	9,330	1,390,410	0.67%	1.8
10	Minneapolis-St. Paul- Bloomington MN-WI	8,020	1,822,920	0.44%	1.2
TOTAL	United States	521,070	140,886,310	0.37%	1.00

Sources: Bureau of Labor Statistics, U.S. Census Bureau



Pharma & Medicine Manufacturing Performance

NAICS Industry Code: 3254

17,450

Pharma & Medicine Manufacturing Professionals

Occupations include Biochemists, Bioengineers, chemical technicians, system operators, mixing and blending machine setters, operators and tenders, among others.

Growth in Workforce over the last decade

*Greater Houston has a 1.6 "Location Quotient" which means it is 60% more concentrated in these transferrable occupations than the U.S. overall (as baseline) due to Houston's biotech manufacturing industry and relevant process-oriented production in other industries that provide transferrable skill sets.



#2 Emerging Life Sciences Cluster

(CBRE-2021)

Houston's high concentrations of life science employment, healthy funding scene, and commitment to translational research is making it one of the country's fastest growing life sciences ecosystems.

TEXAS MEDICAL CENTER

Texas Medical Center, the world's largest, is at the forefront of advancing life sciences through cross-institutional collaboration, creativity and innovation.

TMC Medical Campus:

World Class Clinical Care

- 60+ Member institutions
- 10M Patients annually
- Access to resources, clinical trials, and leading treatments.

TMC Innovation Factory:

Early-stage Innovators, Programming and space.

- 300+ Start-ups
- \$50M TMC Venture Fund
- \$5.8B Raised to Date

TMC Helix Park, Collaborative core of TMC

- 2023 Opening
- 6M SF of Research Labs, Largescale Commercialization, Retail space and Hotel
- TMC3 Collaborative Research Building With 4 Founding Institutions







OmniScience

The Texas Medical Center has been a fantastic launching point for us...The exposure to the TMC clinical research community has been essential to informing the strategy for our Vivo platform and our Ergo platform.

Angela Holmes, MSBME

CEO, OmniScience



Community Resources

Innovation and Entrepreneurial Support Enables a Thriving Ecosystem













UTMB Innovation & Entrepreneurship



























Educational Institutions and Programs

Houston has a strong life sciences education and research ecosystem, including:



















Galveston
National
Laboratory
At The University of Texas
Medical Branch



Hospitals & Health Care Providers

Houston has a strong foundation of more than 240 hospitals and health care providers in the region, employing more than 435,000 individuals:































Research **Funding**

Houston enjoys a robust basic and clinical research environment, with **nearly \$1 Billion** in funding from the National Institutes of Health alone in 2023.

\$937M **National Institutes** of Health (NIH) medical research

grants ('24)

1,752 medical research grants awarded in '21

4,906+ active clinical trials (over 20% of all trials in the U.S.)

Sources: GHP Research 2023



GREATER HOUSTON PARTNERSHIP.

Cell & Gene Therapy in Houston



CTMC, the Cell Therapy Manufacturing Center, is a joint venture between National Resilience and MD Anderson Cancer Center. Located in the Texas Medical Center, CTMC's physical proximity to MD Anderson facilitates collaboration with its expert network of researchers, leverages its robust clinical trial infrastructure, and brings novel, groundbreaking therapies closer to patients. Within the last 18 months, CTMC filed and received approval for 6 INDs without delay and currently has 8 therapies in clinical trials.





Workforce Programs

Houston's colleges work to educate the next generation of workforce















Cellipont, a leading cell therapy contract development and manufacturing organization (CDMO), announced the grand opening of its purpose-built 76,000 sq. ft. manufacturing facility in the north Houston suburb of The Woodlands, TX. The facility includes 7 clean rooms, QC labs, temperature-controlled storage, shipping bays, warehouse, and admin offices.





Cellipont is excited to move forward with this next stage as a best-in-class cell therapy CDMO... Houston is an ideal location to serve clients and patients across all of North America, with two major airports and a strong local workforce.



Deborah Wild CEO, Cellipoint



Recent Real Estate Developments



TMC Helix Park

37-acre campus Medical District



Levit Green

52-acre, office and research Medical District



Generation Park

4,300-acre mixed use Lake Houston



The Woodlands Innovation District

Over 1M sf of potential

The Woodlands



Alexandria Center for Advanced Technologies

12-acre lab space redevelopment

The Woodlands



Lower Kirby District

Dynamic 1,200-acre mixed use Pearland

8M square feet of Life Sciences Space

in regional hubs





HOUSTON

Cancer Prevention and Research

- CPRIT \$6 Billion, 20-year State
 Funding Initiative
- Create and expand life science infrastructure across the state
- Expedite innovation in research and enhance the potential of breakthroughs in prevention and cures.

269
New Clinical Studies

9.586M
Prevention services

provided to Texans

Funding

\$9.586B
Non-State Follow-on

295
Cancer Researchers and their labs recruited to Texas

225
Childhood & Adolescent cancer projects

Core facilities supported to ensure cutting-edge research



HOUSTON

Dementia Prevention and Research

- DPRIT \$3 Billion, 10-year State **Funding Initiative**
- Create and expand life science infrastructure across the state
- **Expedite innovation in research** and enhance the potential of breakthroughs in prevention and cures.

\$260B Anticipated economic impact for strategic brain health initiatives (McKinsey Health Institute



March 2025

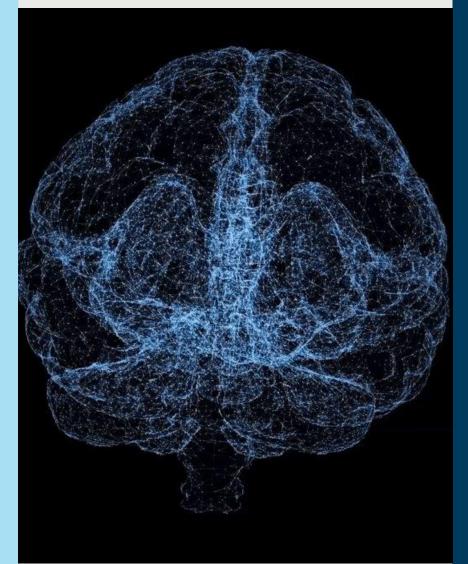
Passed representatives and senate with bipartisan support

May 2025

Signed into law by Texas **Governor Greg Abbott**

Nov. measure





PackGene Biotech expands in Houston



PackGene Biotech Inc., an adeno-associated viral (rAAV) vector CRO and CDMO, expanded its U.S. services with a new cGMP biomanufacturing and processing facility in Houston in early 2023. The 25,000-square-foot facility includes process and analytical laboratories, cGMP manufacturing cleanrooms and support areas, quality control laboratories, a warehouse, and office space. PackGene plans to nearly triple its Houstonarea workforce in the coming months.





Synthetic Biotechnology

- Synthetic biotechnology can change the genetic material in viruses, bacteria, yeasts, plants, or animals to give them useful new characteristics.
- Houston is uniquely positioned to suit the oncoming \$40B boom in synthetic biotechnology
- With established industries including energy and life sciences, Houston's workforce can meet anticipated demands quicker than anywhere else
- Major Houston synthetic biotech companies like Cemvita, Solugen and Syzygy have already made monumental impact



"Plugging into existing infrastructures enables Cemvita to unlock sustainability, affordability, and scale. There is nowhere better to do that than Houston. With its existing and robust infrastructure, Houston is an obvious choice for the endless applications of our product."



Moji Karimi
Co-Founder & CEO, Cemvita







HOUSTON

The Epicenter of Human Spaceflight

With an unparalleled history in space exploration as home to NASA, a thriving innovation ecosystem and the world's only urban spaceport, the future of the space economy runs through Houston.







500+

Space, aviation and aerospace-related firms and institutions

\$2.9B

In spacecraft and aircraft trade

1 FAA-Commercial Licensed Spaceport

#1

Largest cluster of space research and technology





NASA

Home of NASA's Mission Control at Johnson Space Center

Houston Spaceport Home to an FAA-Licensed spaceport, the world's only truly urban commercial spaceport

#1

Largest cluster of space research and technology

\$2.9B

Aircraft, spacecraft and parts traded

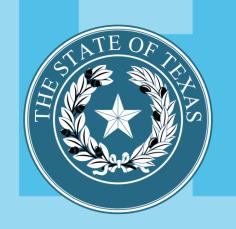
500

Aerospace, aviation and space companies operating in Houston region

TEXAS

Texas Space Commission

In 2023, the 88th Texas Legislature and Governor Greg Abbott committed to help grow the space economy and emerging ecosystem in Texas – for civil, commercial, military, and academic sectors to support our nation's needs.



House Bill 3447 Established

Texas Space Commission (TSC)

- Space Exploration & Aeronautics Research Fund (SEARF)
- Texas Aerospace Research & Space Consortium (TARSEC)

\$350 million appropriated for FY 2024-2025 biennium:

- \$200M Texas A&M University Space Institute
- \$150M: SEARF administered by the Texas Space Commission
- Millions of dollars in additional grant funds remain available and the Texas Space Commission has continued to explore pathways to expand funding



Key Differentiators of Houston Space Ecosystem

NASA Johnson Space Center (JSC) and the newly developed Exploration Park

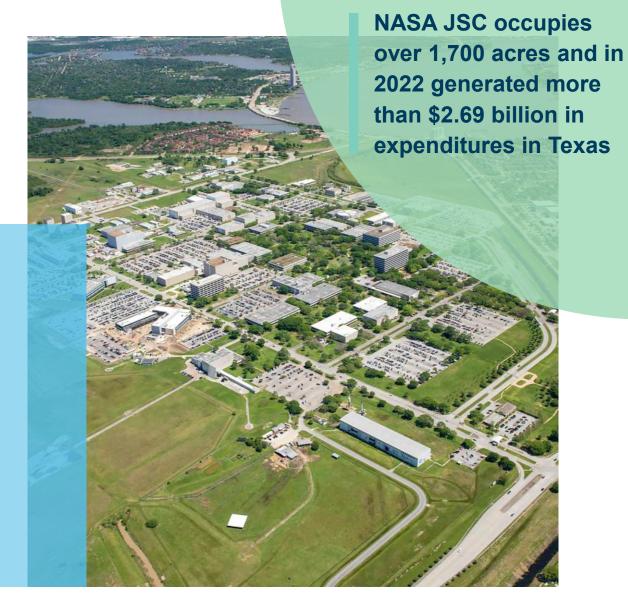
Texas A&M Space Institute, located at Exploration Park, operating the world's largest Lunar scape and Mars scape facility

The Houston Spaceport – only US Spaceport located in an urban environment

Space Center Houston – Official Visitor Center of JSC with 1.2M visitors annually

High concentration of Aerospace engineering, research, design, and development expertise

500 Aerospace and Aviation related organizations





Robust Base of Houston Talent and Companies































































HOUSTON

A Booming Digital Technology Hub

From Compaq and Texas Instruments to Hewlett-Packard Enterprise and a growing number of tech startups, Houston has experience and potential as a top destination for digital technology, revolutionizing the industries that matter.





Established and Growing Companies

Houston is home to more that 8,800 tech-related companies.















Big Tech in Houston

The world's foremost tech giants have committed to Houston for our strong talent and robust industry mix.

















Digitizing the Core Industries

ENERGY

LIFE SCIENCES

INDUSTRIALS



MDAnderson Cancer Center

Making Cancer History®



BP's Center for High
Performance Computing is
using advanced models to
make breakthroughs in seismic
technology, reservoir
engineering, applied sciences
and molecular biology.

MD Anderson's Institute for Data Science in Oncology works to builds data science expertise, addressing challenges in areas like scheduling, patient monitoring, and access to care.

Houston startup Persona AI is partnering with Hyundai and other manufacturers to deploy artificial intelligence enabled robots in manufacturing settings.

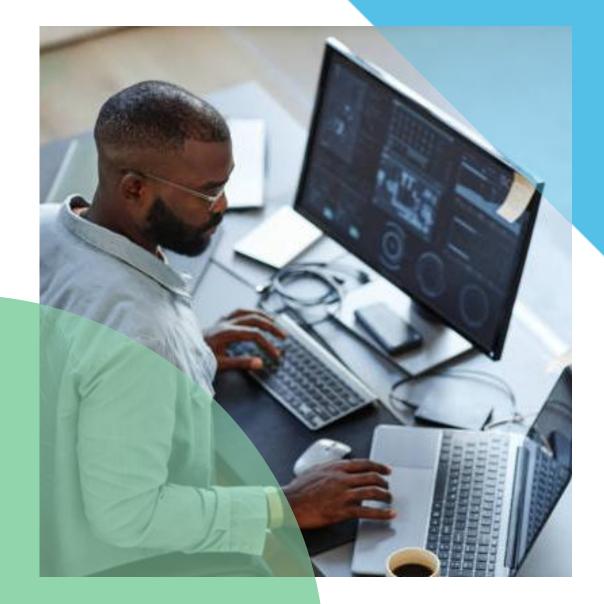


Top Tech Talent

153,000+ Tech Workers

20,000+ Software Developers

35+ Tech Degree Programs



A Hotbed For Innovation

Houston is home to a growing ecosystem of digital tech startups, whether serving the region's core industries or in new, emerging fields like PropTech, Supply Chain Tech, and FinTech. The resources, infrastructure, capital, talent, and innovative culture of the region is helping tech startups find their footing in Houston.

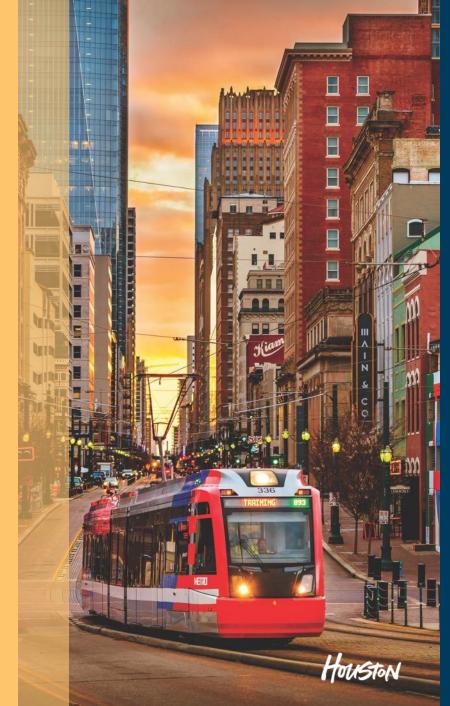
50+
Innovation hubs and incubators

\$10B+

VC Funding since 2020

150+
Coworking spaces

500+Digital Technology Startups



HOUSTON

Innovation That Matters

Houston is a city of problem solvers addressing challenges in the world's most pressing industries.





Energy Capital of the World

With a wealth in experience and an innovative spirit, Houston has the knowledge and resources to power the world's energy ecosystem for today and the future. **21**Fortune 500
Energy HQs

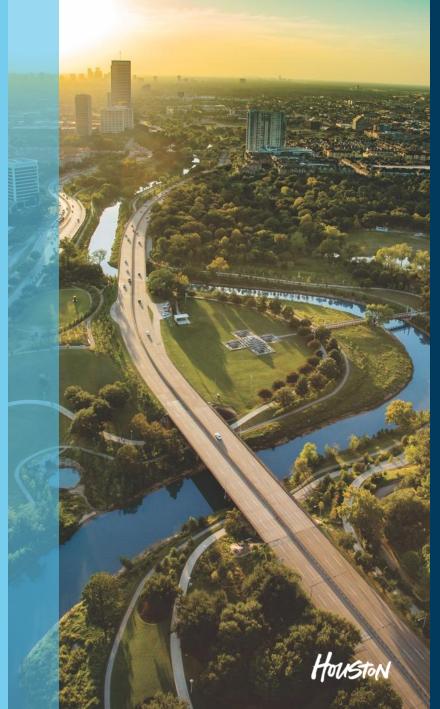
4,200+

Energy firms in Houston

220,000

Energy professionals in Houston

1/3
Of Houston's GDP



HOUSTON

A Manufacturing Powerhouse

Houston's global connectivity, aided by world-class infrastructure and a large industrial workforce, is helping companies manufacture and distribute their product domestically and internationally.



Toshiba Employee in Houston



A Manufacturing Powerhouse



7,200+

manufacturing establishments in the Houston region

\$106+ B

in goods produced annually ('23)

Diverse Markets

aerospace | automotive | biotechnology | energy petrochemical | instrumentation



Thank You

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GREATER HOUSTON PARTNERSHIP.

