



HOUSTON

A Strong, Diverse 21st Century Economy

**HOUSTON IS AN ECONOMIC POWERHOUSE
WITH LEADING POSITIONS ACROSS KEY GLOBAL INDUSTRIES.**

HOUSTON

A Top Global Business Destination



Energy 2.0



Life Sciences



**Advanced
Manufacturing**



**Logistics &
Distribution**



Headquarters



Aerospace



Digital Tech

25 **Fortune 500**
Corporate headquarters

39 **Fortune 1000**
Corporate headquarters

6 **Fortune Global 500**
Corporate headquarters

110 **INC 5000**
Corporate headquarters

20 **Forbes Global 2000**
Corporate headquarters

HOUSTON



Leading the Global Energy Transition.

Houston is leveraging its leadership to accelerate global solutions for a low-carbon, energy-abundant future.

HOUSTON

Energy Capital of the World



19 Fortune 500
energy corporate headquarters

4,650+ energy firms
located in Houston

227,000+ energy professionals
in the Houston region

1/3 Regional GDP
comes from the Energy sector

HOUSTON

Large Base of Low-Carbon Energy Companies

100+ Solar
Related companies



30+ Wind
Related companies



80+ Digital Tech
in energy

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

A Booming Energy Innovation Ecosystem

80+ tech companies
focused on Energy 2.0

50+ SDOs
focused on Energy 2.0

\$3.7 B cleantech VC funding
(since 2015)



HOUSTON



HOUSTON ENERGY TRANSITION INITIATIVE

**LEVERAGE HOUSTON'S INDUSTRY LEADERSHIP TO ACCELERATE GLOBAL
SOLUTIONS FOR AN ENERGY-ABUNDANT, LOW-CARBON FUTURE.**

HOUSTON

Houston Energy Transition Initiative

A Steering Committee composed of **19** founding companies guides HETI's efforts.



HOUSTON

Business & Stakeholder Engagement

Sector specific groups advance work in key areas where Houston has a strategic advantage.

CCUS

Identify and remove barriers to Carbon Capture Utilization & Storage deployment in Houston.

Hydrogen

Assess the economic potential and environmental impact of clean hydrogen to Houston.

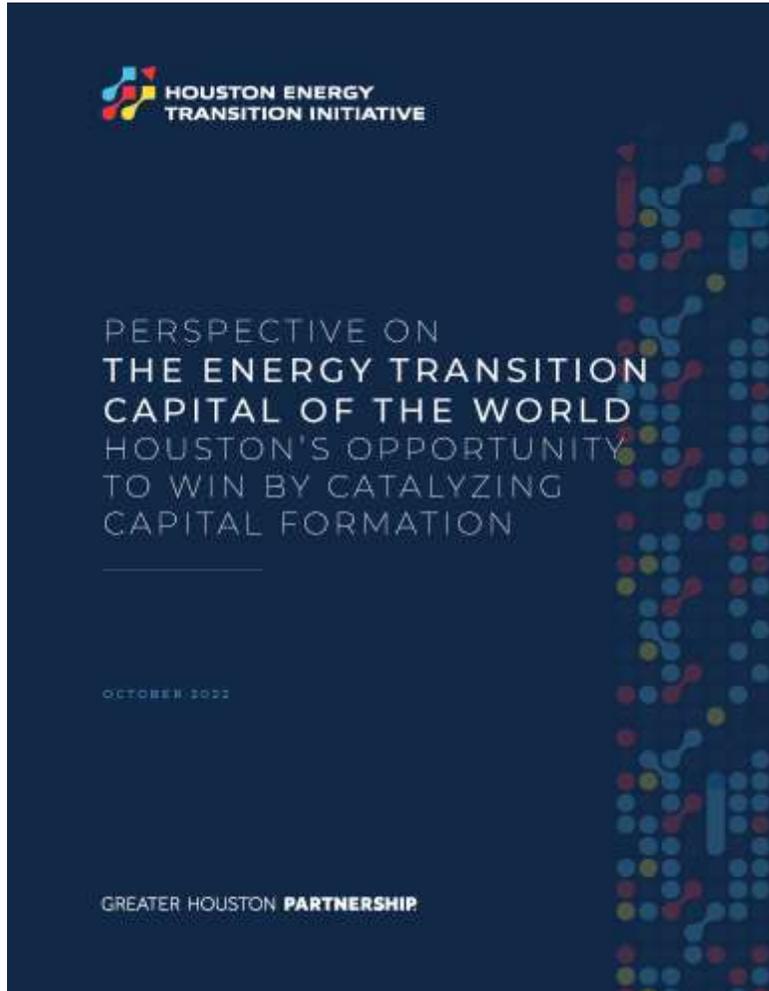
Capital Formation

Identify measures to help fund the energy transition by attracting capital and growing Houston's energy finance market.

Industry Decarbonization

Develop a unified narrative to highlight how the industry is decarbonizing within its operations.

Catalyzing Capital Formation



LEADING THE ENERGY TRANSITION WILL REQUIRE A 10X INCREASE IN INVESTMENT

- **\$150bn** p.a. by 2040
- **\$85bn** p.a. in technologies where Houston has strong base (CCUS, Clean H2, advanced plastics, renewable fuels)
- **Innovation & Talent Hub** – universities, incubators, accelerators, startups
- **Project Hub** – strong collaboration across energy sectors
- **Financing Hub** – robust ecosystem of capital providers & advisors

Life Sciences and Biotechnology.

Houston is taking on the greatest medical challenges of our generation by accelerating the commercial development and deployment of life science technology.

HOUSTON



ABB Robotics / Texas Medical Center Innovation Institute

#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.**

HOUSTON

Healthy Base of Companies

Houston is home to nearly **700** life sciences companies, of which over **380** closely align with Bio activities.

The logo for Johnson & Johnson, featuring the company name in a red, cursive script font.The logo for Lonza, consisting of the word "Lonza" in a bold, black, sans-serif font.The logo for Catalent, with the word "Catalent" in a blue, sans-serif font.The logo for Immatics, featuring three colored circles (red, green, blue) above the word "Immatics" in a black, sans-serif font.The logo for Moleculin, with a blue circular icon containing a white wave-like shape to the left of the word "Moleculin" in a bold, blue, sans-serif font.The logo for InGeneron, featuring a cluster of blue dots of varying sizes to the left of the word "InGeneron" in a black, sans-serif font.The logo for Lexicon pharmaceuticals, with a green and blue icon to the left of the word "Lexicon" in a black, sans-serif font, and "pharmaceuticals" in a smaller font below it.The logo for Precision Medicine Group, featuring a blue and green square icon to the left of the words "PRECISION MEDICINE GROUP" in a blue, sans-serif font.The logo for US Oncology Research, with a blue triangle icon to the left of the words "US Oncology Research" in an orange, sans-serif font.The logo for Castle Biosciences, featuring a blue and white icon to the left of the words "CASTLE BIOSCIENCES" in a blue, sans-serif font.The logo for Mercury Data Science, with the words "mercurydatascience" in a grey, sans-serif font.The logo for VGXI, featuring a green leaf-like icon above the word "VGXI" in a black, sans-serif font.The logo for Kiromic, with a sunburst icon to the left of the word "KIROMIC" in a grey, sans-serif font.The logo for Marker Therapeutics, featuring a colorful circular icon to the left of the words "MARKER Therapeutics" in a blue, sans-serif font.The logo for Bellicum Pharmaceuticals, with an orange and white icon to the left of the words "Bellicum PHARMACEUTICALS" in a black, sans-serif font.The logo for KBI Biopharma, featuring an orange and blue icon to the left of the words "KBI BIOPHARMA" in a blue, sans-serif font.The word "HOUSTON" in a teal, cursive script font.

The Brightest Minds in Medicine

106,000+

Biotech Specialists

60,000+

**medicine, biotech and health
students annually**

25,700

**Life Science & Biotech
Researchers**



HOUSTON

Research Funding

Houston enjoys a robust research environment, with almost **\$900 million in annual research** awarded in the region in 2021.



\$864M National Institutes of Health (NIH)
medical research grants ('21)

1,649 medical research grants
awarded in '21

4,906+ active clinical trials
(15% of all trials in the U.S.)

Life Sciences Developments

There are over **2.1M sf of life sciences developments** currently underway in Houston.



TMC Helix Park
37-acre campus



TMC3 Collaborative Building
multi-institutional research
facility



TMC BioPort
500 acres, biomanufacturing
campus



Levit Green
52-acre, office and research



Texas A&M Innovation Plaza
\$550 million, 5-acre mixed use



Generation Park
4200-acre mixed use



Gerald D. Hines Waterwall Park

Digital Technology and Innovation.

Houston chooses to accept humankind's boldest challenges head-on. And in doing so has emerged as a leading hub for industrial technology and innovation.

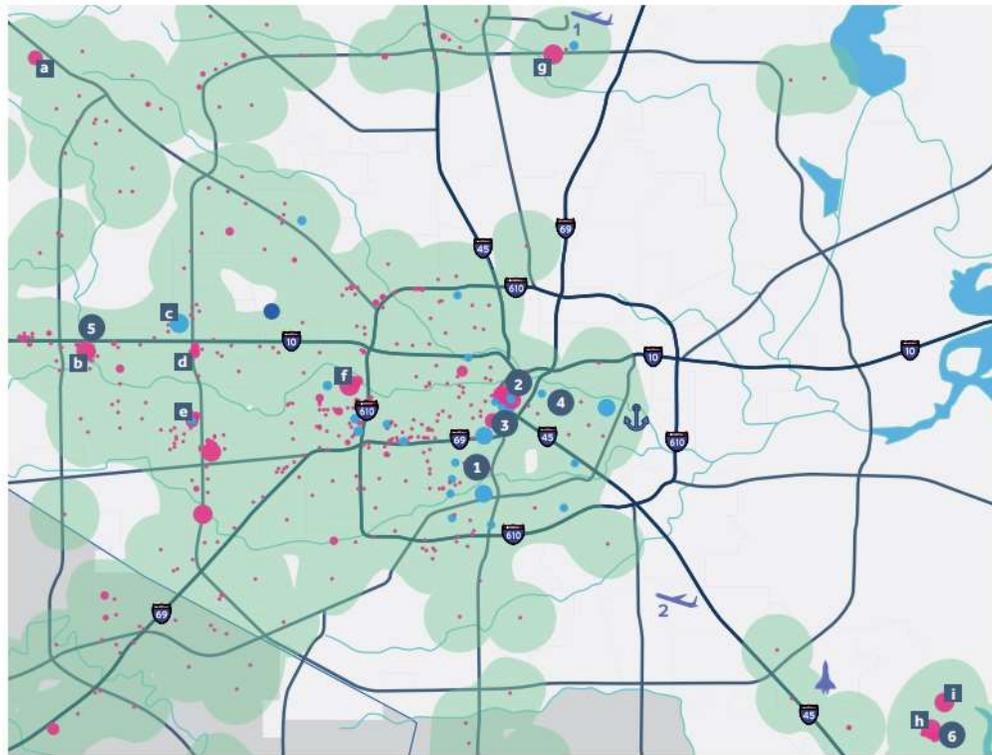
HOUSTON

#5 Top Emerging Global Ecosystem for Startups *(Startup Genome- 2022)*

**HOUSTON OFFERS A ROBUST SUPPORT SYSTEM NEEDED FOR YOUNG
STARTUPS TO THRIVE INCLUDING ACCESS TO TALENT, FUNDING,
CUSTOMERS, AND MORE.**

HOUSTON

Thriving Tech Economy



243,400 tech professionals

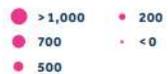
\$4.35 B in VC Funding since 2017

\$29.2 B economic impact (5.8% of GDP)

800+ venture-backed tech startups

MAP LEGEND

TECH EMPLOYERS

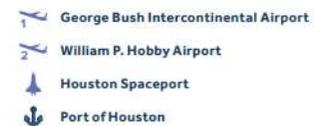


■ SDOS

SELECTED HOUSTON INNOVATORS



INFRASTRUCTURE



HOUSTON

Thriving Tech Economy

Houston is home to **8,800** tech-related firms, including **1** Fortune 500 HQ.



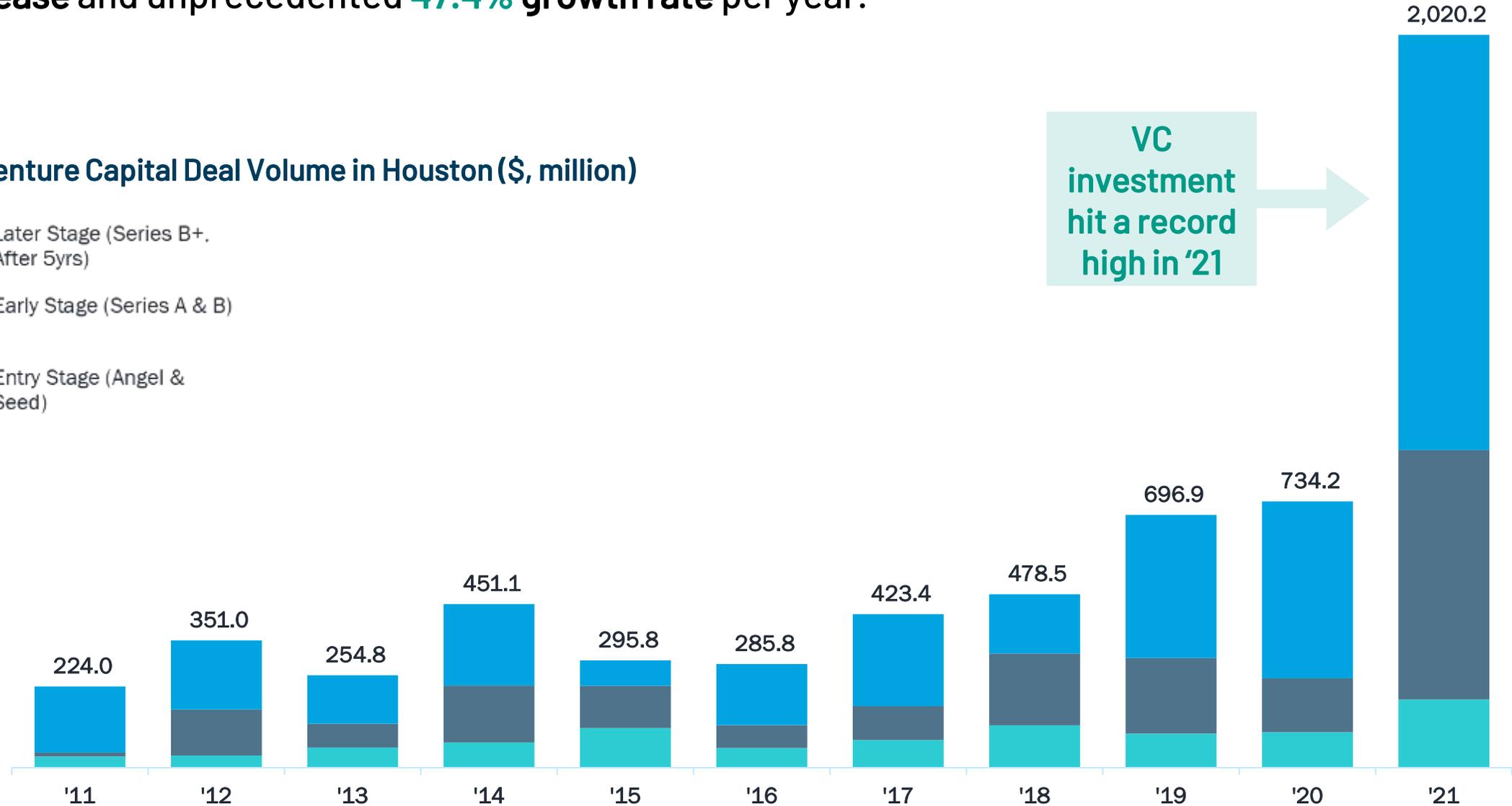
Houston

The Money is Flowing

Venture Capital investment has grown from \$423 million in 2017 to **\$2.02 billion** in 2021, a near **five-fold increase** and unprecedented **47.4% growth rate** per year.

Venture Capital Deal Volume in Houston (\$, million)

- Later Stage (Series B+, After 5yrs)
- Early Stage (Series A & B)
- Entry Stage (Angel & Seed)



HOUSTON

Commercial Aerospace.

The missions of tomorrow – to the moon, to Mars and beyond – are being planned today by the innovative minds who call Houston home.

HOUSTON



Johnson Space Center

Among NASA's largest research & development facilities.



\$8.7 B economic output
in 2020

\$5.56 B in annual budget
in 2020

\$2.3 B in contracts
with Houston companies

11,800+ employess
and contractors

HOUSTON

Robust Base of Talent and Companies

500+ aerospace & aviation
companies and institutions

23,000+ aerospace & aviation
professionals



HOUSTON



**HOUSTON
SPACEPORT**

Houston Spaceport, the world's only truly urban commercial spaceport, is serving as a catalyst for growth in the commercial space sector.





Toshiba Employee in 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.

HOUSTON

A MANUFACTURING POWERHOUSE

6,700+ manufacturing establishments
in the Houston region

223,000+ employed in manufacturing
(one of the **largest** in the U.S.)

\$86 B
in goods produced annually
(‘20)

DIVERSE MARKETS
aerospace | automotive | biotechnology | energy
equipment controls | instrumentation

HOUSTON

WORLD-CLASS INFRASTRUCTURE

#1 U.S. PORT
Port of Houston

230.1 M Metric tons of trade
Houston region seaports (2020)

2 INTERNATIONAL AIRPORTS
only Texas city | 1 of 8 cities nationwide

128,592+ Metric tons of airborne trade
Houston-area airports (2019)



HOUSTON

Trade & Logistics Hub

5,100+ transportation & warehousing establishments

149,000+ logistics workers transportation & warehousing

1,000+ logistics service providers, customs brokers and 3PLs

GROWING BASE
distribution-logistics centers

Equidistant to East and West Coast



HOUSTON

ありがとうございました
THANK YOU

HOUSTON