

Houston

REGIONAL ECONOMIC
DEVELOPMENT ALLIANCE

Tuesday, August 13, 2024



Attendee Introductions

Casey Schrade

Director, Regional Economic Development, Greater Houston Partnership



Welcome Remarks

Stephanie Wiggins

HREDA Chair and Chief Economic Development Officer, Partnership
Lake Houston



Regional Project Pipeline Updates & Discussion

Noah Fons
Manager, Regional Economic Development
Greater Houston Partnership



2024 Economic Development Wins

By the Numbers

18 Projects
2880 New Jobs

\$859.7 Million Capex
Domestic - 6 Int'l - 12

Energy Transition



Manufacturing



Energy



Life Sciences



Aerospace & Aviation



Logistics



Regional Economic Development

Announcements - July



Chenta Precision Machinery, a Taiwanese gearbox manufacturer, is opening a site for manufacturing and assembly of gearboxes for solar and EV uses. The project will create 25 jobs with \$10M in capital expenditures.

Regional Economic Development

Announcements - July



Fluxworks, a producer of magnetic gearboxes, is relocating their offices, R&D, and production from College Station to Conroe. The project will initially create 30 jobs with \$1M in capital expenditures.

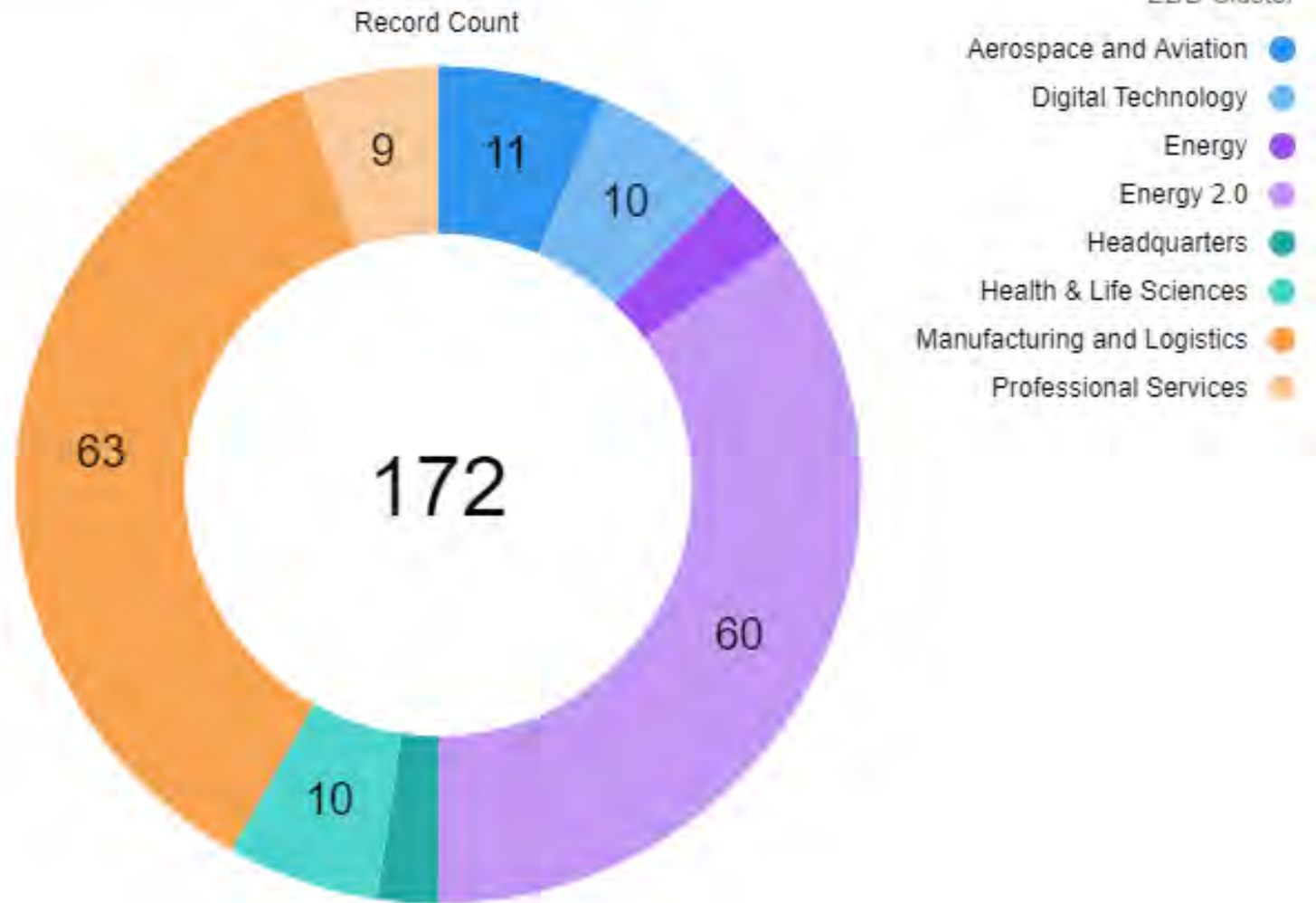
2024 Economic Development Wins

Project Names by Capex

1. QYK Brands – Project Tough Care
2. Grainger – Project Mercury 2
3. Bionova Scientific – Project Sunny Skies
4. IC Star Solar – Project Pink Lily
5. Solar Plus Technology Texas – Project Lumos
6. CZT Energy – Project Sunflower
7. May Food Produce – Project Star Apple
8. Poggipolini – Project Fastener
9. Triveni Turbine – Project Texas Vapor
10. Chenta Precision Machinery – Project Green Machine
11. Polyhose – Project Hose
12. Fluence Energy – Project Foliage
13. NABOHI – Project Waimea
14. Polymaker – Project FD4
15. Winit America – Project Pigeon
16. Fluxworks – Project Fluxworks
17. YPFB Chaco – Project YPFB
18. Renewable Parts – Project Renewable Parts

EDD Update: 2024 Project Pipeline

EDD Open Projects - By Cluster



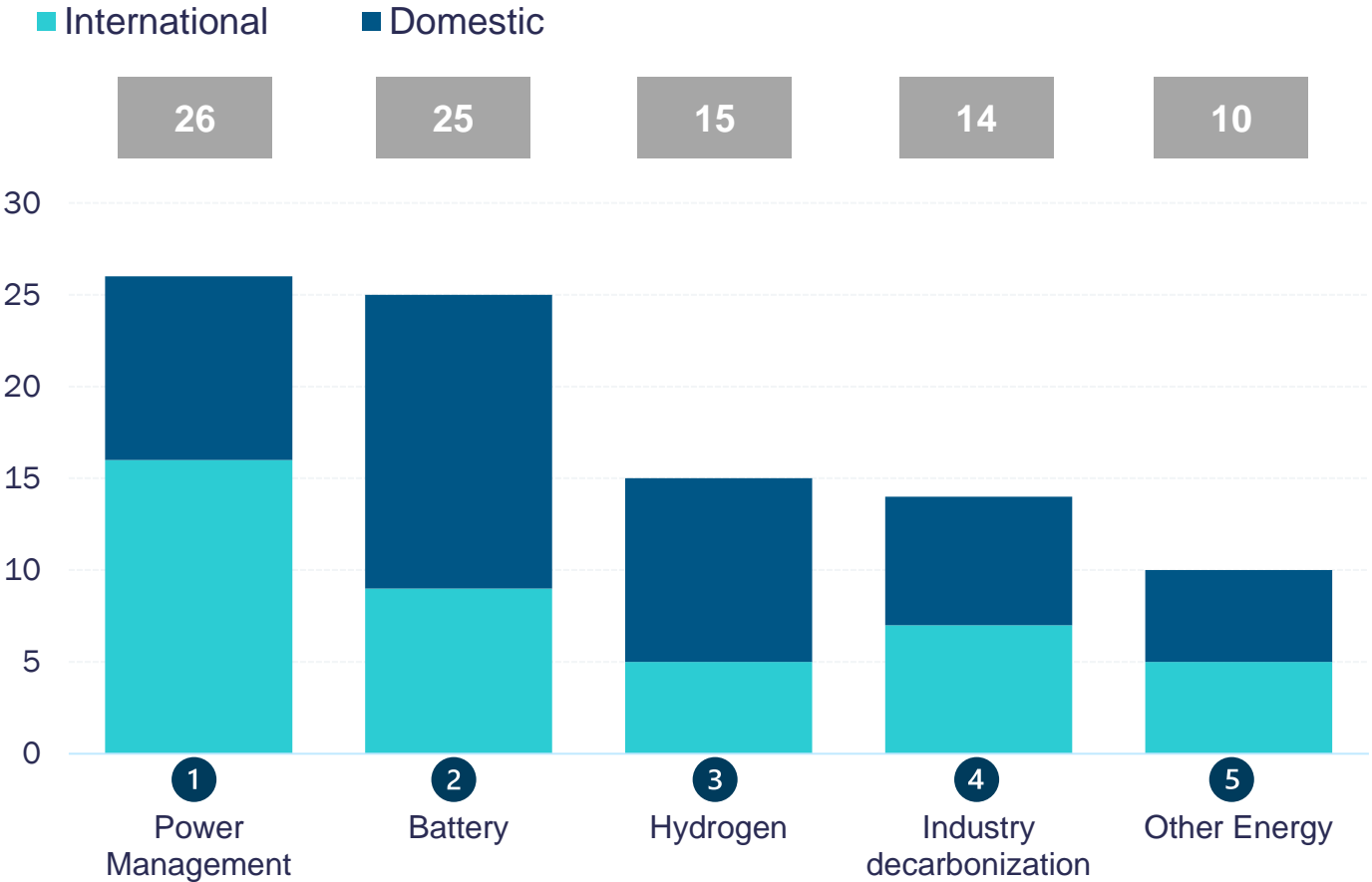
Project Pipeline: 172 projects; ~98,900 jobs; ~\$68.6 B Capex

~90 out of 176 projects in the project opportunity pipeline are energy-related

This highlights the critical importance and dominance of energy projects within the overall portfolio

Energy Opportunities Pipeline

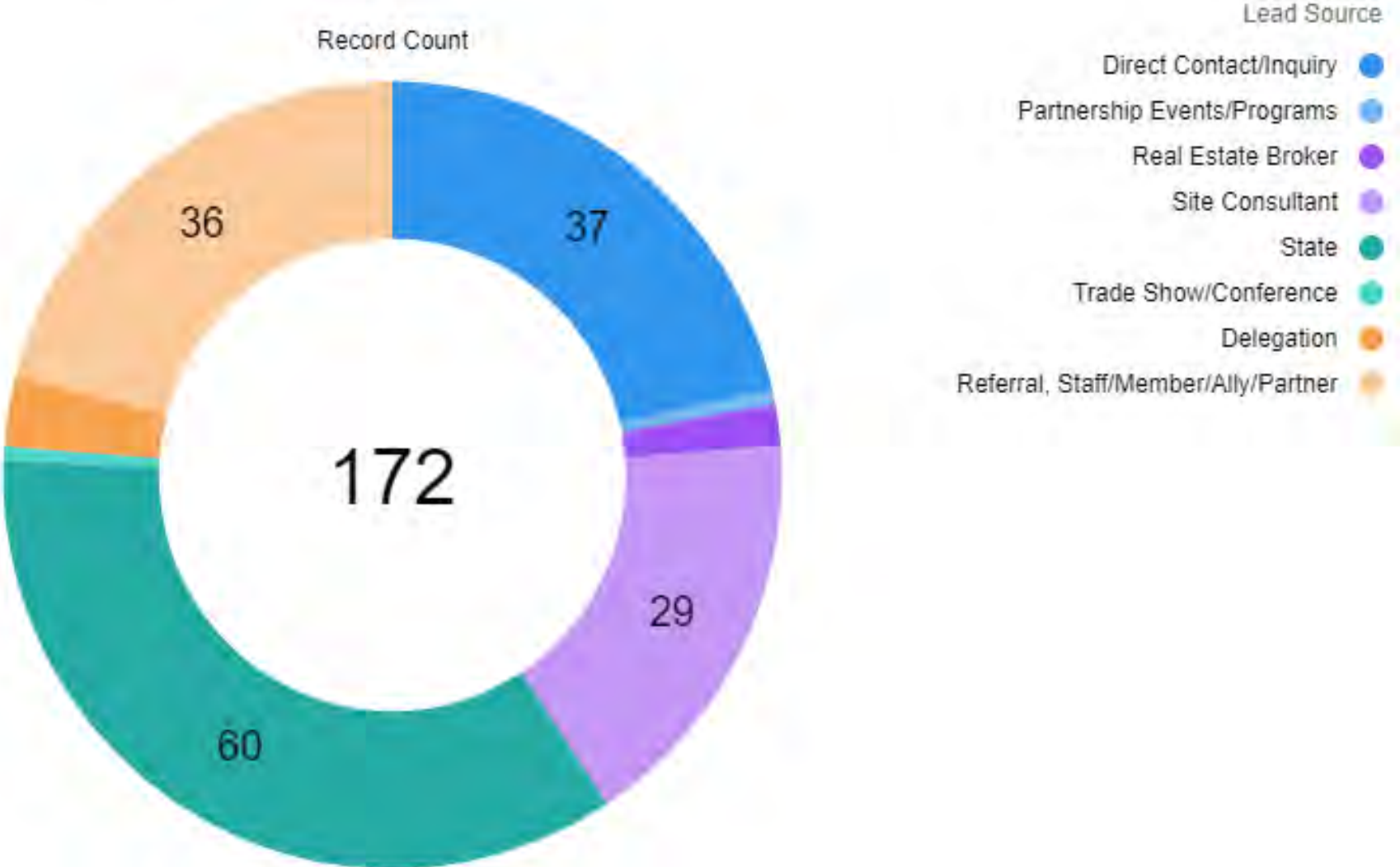
As of End July 2024



- 1 **Power Management** – Opportunities under Wind, Solar / PV installation / manufacturing, power gen equipment, grid components , energy / data solutions, HQ relocation
- 2 **Battery** – Opportunities under Equipment / Component manufacturing (anodes / cathodes / electrolytes) grid or EV / Storage
- 3 **Hydrogen** – Opportunities relating to H value chain, i.e., production / Tech Manufacturing / End use / R&D
- 4 **Industry decarbonization** – Opportunities aimed at reducing emissions, Circular economy, clean tech, co2 capture or under SAF, E-Methane, Biofuels etc.,
- 5 **Other energy** – Opportunities under the heading of Petro/chemical, critical minerals extraction, and energy R&D

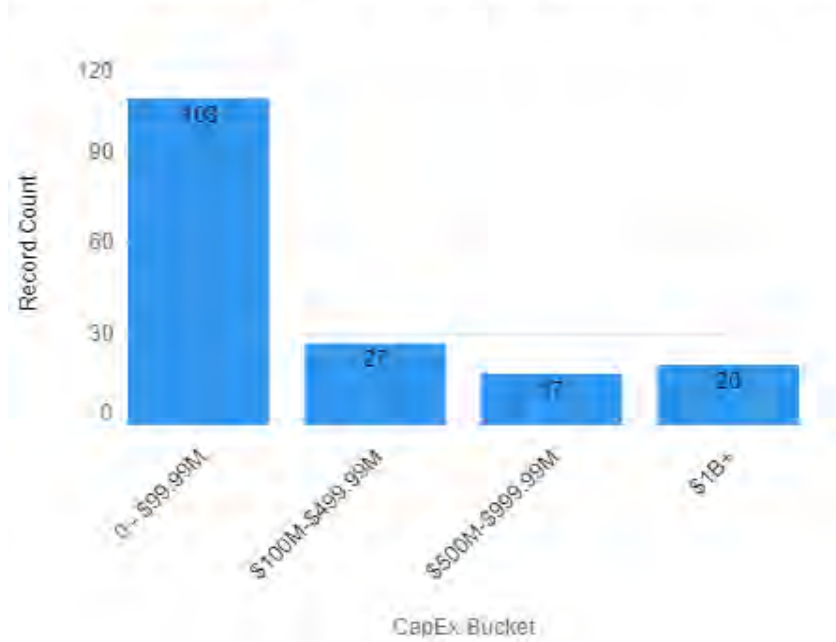
EDD Update: 2024 Project Pipeline

EDD Open Projects - By Lead Source

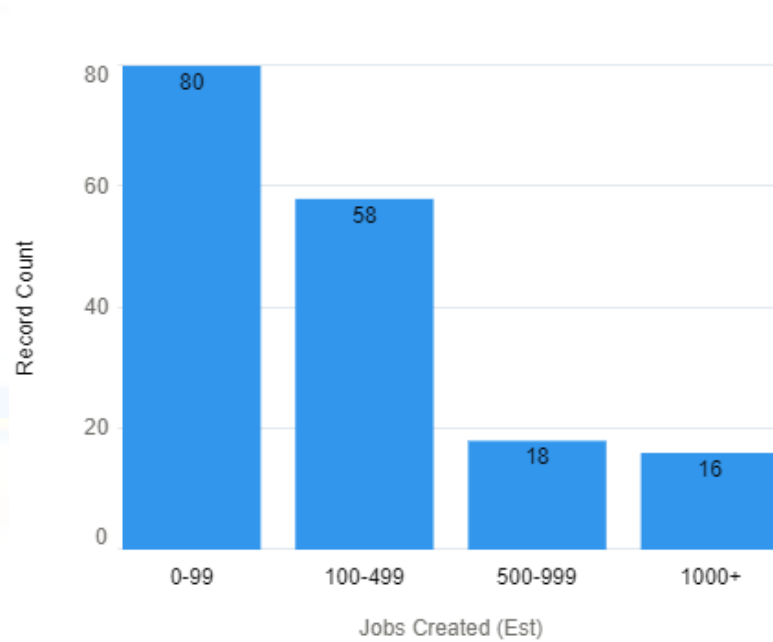


EDD Update: 2024 Project Pipeline

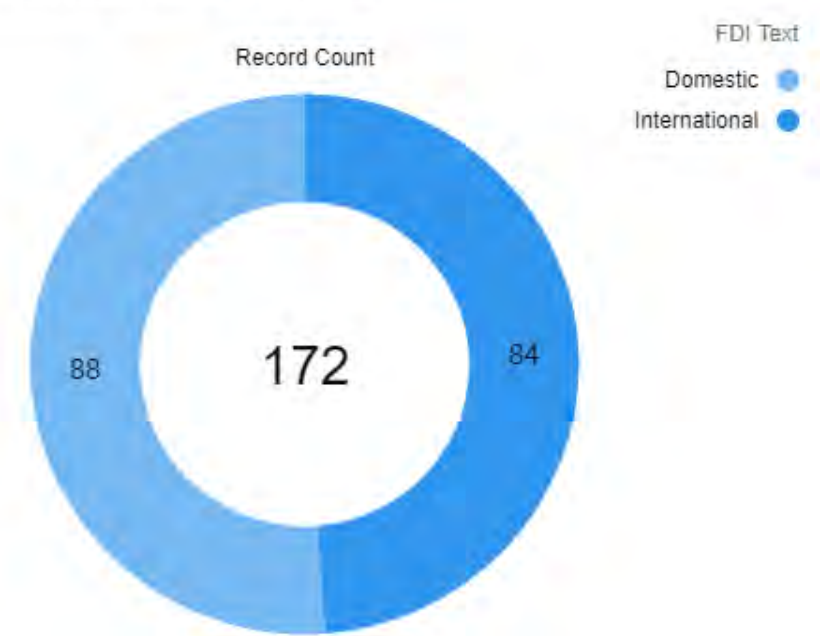
EDD Open Projects - Estimated Capital Investment



EDD Open Projects - Estimated Jobs Created

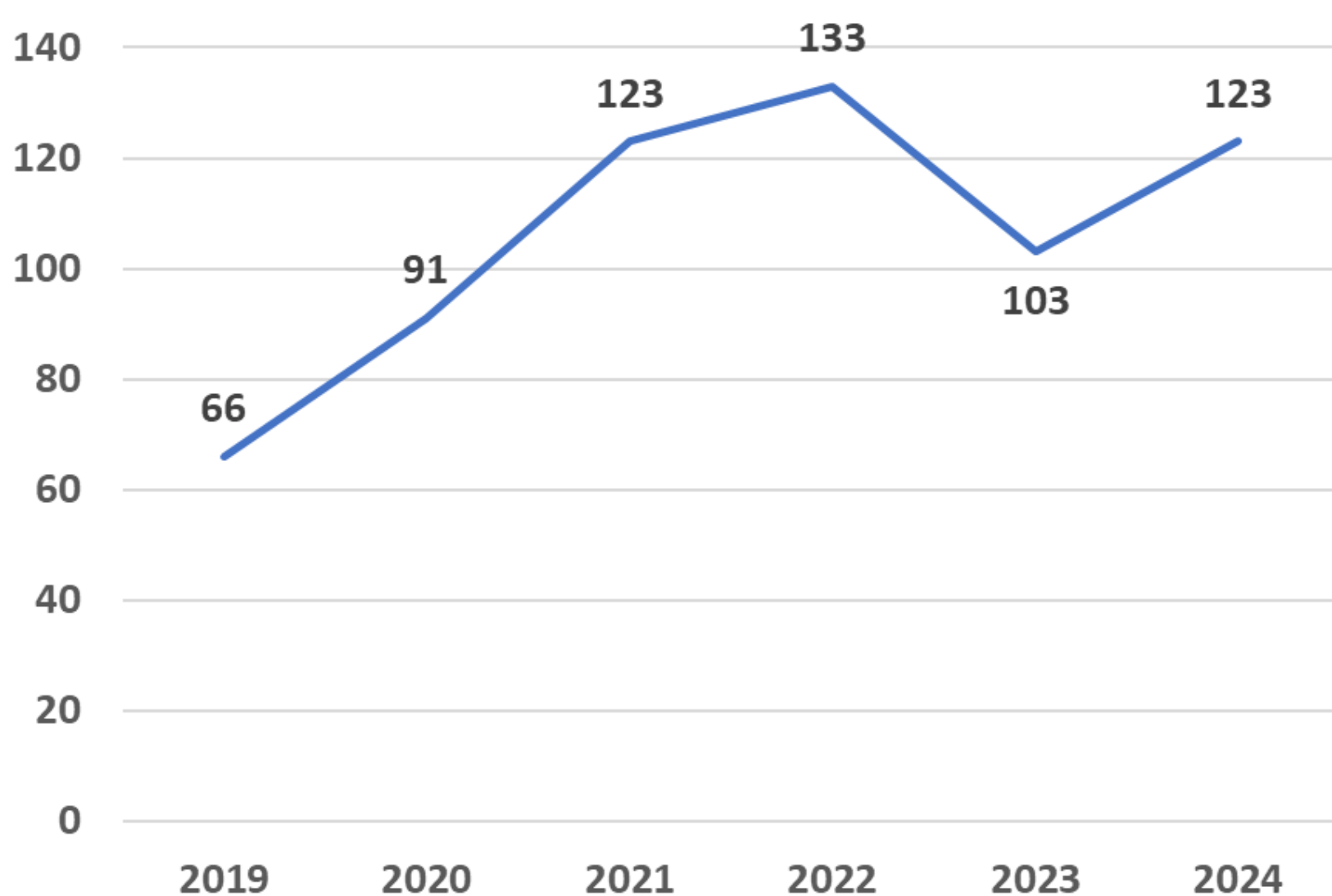


EDD Open Projects - By FDI



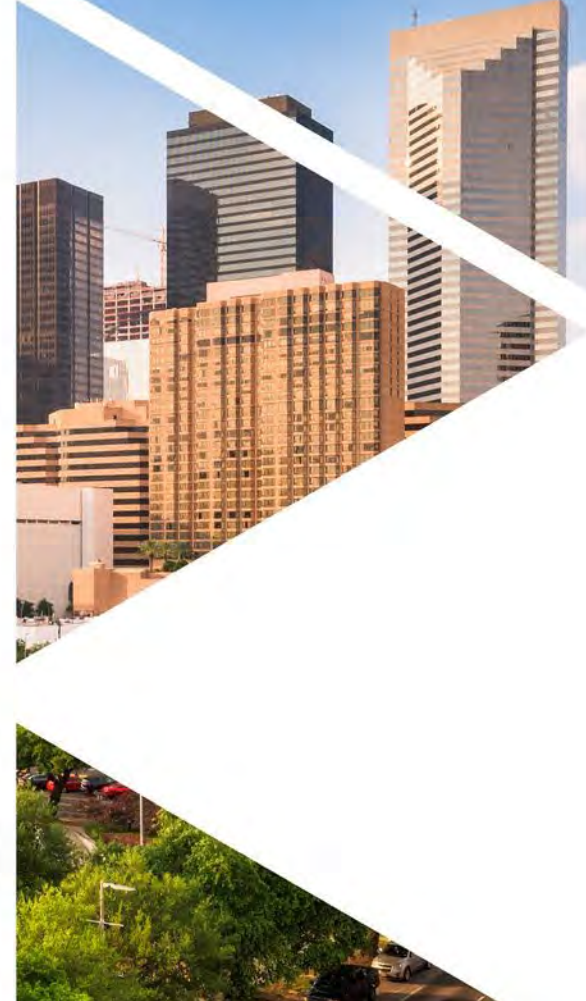
EDD Update: 2024 Project Pipeline

January-July Inbound Projects



Regional Life Sciences Overview

Verena Kallhoff, PhD, MBA
Sr. Director, Global Life Sciences
Greater Houston Partnership



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.

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 in the Region

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

Johnson & Johnson

Lonza

CTMC+

IntelliGenome

Millar

SB Sino Biological

icyrion

Immatics

Moleculin

InGeneron

Lexicon
pharmaceuticals

Abbott

US Oncology
Research

C/STLE
BIOSCIENCES

OmniScience

VGXI

KIROMIC

Cellipont
BIOSERVICES

nurix

tvardi
THERAPEUTICS

π PackGene

MARKER
Therapeutics

PULMOTECT

MERITMEDICAL

Finc 丰科

HOUSTON

A Region of Excellence

Life Sciences Hubs of Greater Houston

Conroe (Montgomery County)

Texas Medical Center (Harris County)

Lake Houston (Harris County)

Pearland (Brazoria County)

Sugar Land (Fort Bend County)

The Woodlands (Montgomery County)



Recent Real Estate Developments

Home to 8M square feet of Life Sciences Lab Space



TMC Helix Park
37-acre campus
Medical District



Generation Park
4,300-acre mixed use
Lake Houston



Alexandria Center for Advanced Technologies
12-acre lab space redevelopment
The Woodlands



Levit Green
52-acre, office and research
Medical District

HOUSTON



Lower Kirby District
Dynamic 1,200-acre mixed use
Pearland



The Woodlands Innovation District
Over 1M sf of potential
The Woodlands

TMC

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, Retail, Hotel, & Large-scale Commercialization
- TMC3 Collaborative Research Building

HOUSTON

The Brightest Minds in Medicine

106,000+

Biotech Specialists

60,000+

medicine, biotech and health
students annually

25,700

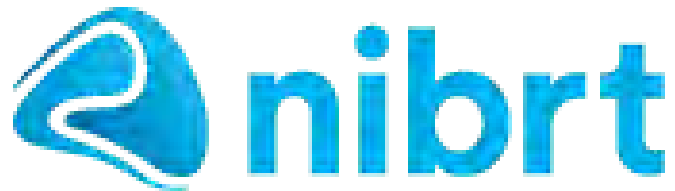
Life Science & Biotech
Researchers



HOUSTON

Workforce Programs

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



Universities

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



Houston

Research Funding

Houston enjoys a robust research environment, with over **\$900 million in annual research** awarded annually



\$951M National Institutes of Health (NIH) medical research grants ('23)

1,752 medical research grants awarded in '21

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

CPPRIT

- \$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.

 <p>64 Established Investigators</p> <p>Senior research faculty with distinguished professional careers and established cancer research programs.</p>	 <p>32 Rising Stars</p> <p>Early-stage investigators who have demonstrated the promise for continued and enhanced contributions to the field of cancer research.</p>
 <p>214 First-Time, Tenure-Track Faculty</p> <p>Emerging investigators pursuing their first faculty appointment who have the ability to make outstanding contributions to the field of cancer research.</p>	 <p>3 Missing Links</p> <p>Investigators who can fill special and specific needs as critically important members of collaborative research teams.</p>

 <p>297 New Clinical Studies</p>	 <p>9.66M Prevention services provided to Texans</p>	 <p>\$9.854B Non-State Follow-on Funding</p>
 <p>313 Cancer Researchers and their labs recruited to Texas</p>	 <p>238 Childhood & Adolescent cancer projects</p>	 <p>73 Core facilities supported to ensure cutting-edge research</p>

HOUSTON

Source: <https://www.cpr.it.state.tx.us/> May 2024



CANCER PREVENTION & RESEARCH INSTITUTE OF TEXAS



A grid of logos for various pharmaceutical and biotech companies, including: 7 HILLS PHARMA, Aakha Biologics, aeglea, alloVir, ALLTHERUM, apollo endosurgery, aravive, ARES IMMUNOTHERAPY, Asuragen a biotechnical brand, asyria THERAPEUTICS, ATOM MINES, BARRICADE, bectas THERAPEUTICS, Bellicum, CerRx, CROSSBRIDGE BIO, CTMC+, Curtana PHARMACEUTICALS, DIALECTIC THERAPEUTICS, DNATrix THERAPEUTICS, EMTORA BIOSCIENCES, ESSA, fixnip, FORBIUS, FUJIFILM Di-synth, GRADALIS, Hummingbird Bioscience, iBio, kealex THERAPEUTICS, immatics, ImmuneSensor THERAPEUTICS, IMMUNOGENESIS, INDAPTA THERAPEUTICS, InformAI, InGeneron, IRTAPAFI, investys, βCat Pharma, Iterion, >>kuur, MARCH BIOSCIENCES, MARKER Therapeutics, MEDICENNA, mirna THERAPEUTICS, tem MOLECULAR TEMPLATES, MongooseBio, ms pen TECHNOLOGIES, NanoTx, NEXEON, OncoResponse, onconano, OncoResponse, PanTher Therapeutics, PELICAN THERAPEUTICS, Peloton Therapeutics, PERIMETER, PLUS THERAPEUTICS, PRANA THERAPEUTICS, PULMOTECT, RULES-BASED MEDICINE, Salaris PHARMACEUTICALS, SINGLECELL BIOTECHNOLOGY, Stellanova THERAPEUTICS, STINGRAY THERAPEUTICS, VIRACYTE ADVANCING CELL THERAPY, VISUALABE, xerient.

TMCⁱ | ACCELERATOR

BIOHOUSTON
BUILDING THE LIFE SCIENCE FUTURE

ION
DISTRICT

CUBIO
INNOVATION CENTER

Portal

FANNIN

UTMB Innovation & Entrepreneurship

JLABS @ TMC

Everything is bigger in Texas ... especially innovation.

RICE
Biotech Launch Pad

CDI @ TMC
CENTER FOR DEVICE INNOVATION

UH TECHNOLOGY BRIDGE

Gulf Coast Consortia
REACH
Research Evaluation and Commercialization Hub



EAST END
MAKER HUB

IGNITE

Women Shaping the
Future of Healthcare

BiWell

TMCⁱ | BIODESIGN

Community Resources:

Innovation and
Entrepreneurial
Support Enables
a Thriving Ecosystem

Making Waves

Houston life sciences and biotechnology companies in the news

Pharmaceutical
Technology

News

Immatics to raise \$175m in public offering

Expected to close on 22 January 2024, the German biotech's offering follows the \$1.7bn-topping deal with Moderna struck in late 2023.

Robert Barrie | January 18, 2024

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Houston

Clinical Trials
Arena

News

March Bio announced \$4.8m supporting Phase II leukaemia treatment trial

The US-based company has set aside the funding to bolster clinical support investigating the therapy in CD5-positive patients.

Joshua Silverwood | November 10, 2023

SIMPLY WALLET

With 32% ownership, Neurogene Inc. (NASDAQ:NGNE) has piqued the interest of institutional investors

Pharmaceutical
Technology

News

Neurogene concludes merger deal with Neoleukin Therapeutics

The closure comes after the companies signed a definitive merger deal in July 2023.

December 20, 2023

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 Houston-area workforce** in the coming months.

HOUSTON

Cellipont Bioservices

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, Cellipont*

HOUSTON

Bionova



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Bionova Scientific announces plans for new Plasmid DNA GMP facility

Facility in The Woodlands, Texas, will produce critical starting material for cell and gene therapy, DNA/RNA-based, and recombinant proteins.

Bionova Scientific is an Asahi Kasei Group company and full-service biologics CDMO,

HOUSTON★**CHRONICLE**

Bionova Scientific gets tax abatement for new \$56M facility expansion in The Woodlands

By Catherine Dominguez
May 9, 2024

Montgomery County commissioners approved a tax abatement for Bionova Scientific for the company's \$56 million expansion in The Woodlands.

HOUSTON★**CHRONICLE**

The Woodlands approves tax abatement for California-based Bionova's new \$56M facility

By Claire Partain
Jun 27, 2024

A California-based biotechnology company has cleared another hurdle in completing a new \$56 million facility in The Woodlands.

**Thank you for
attending!**

