

Houston

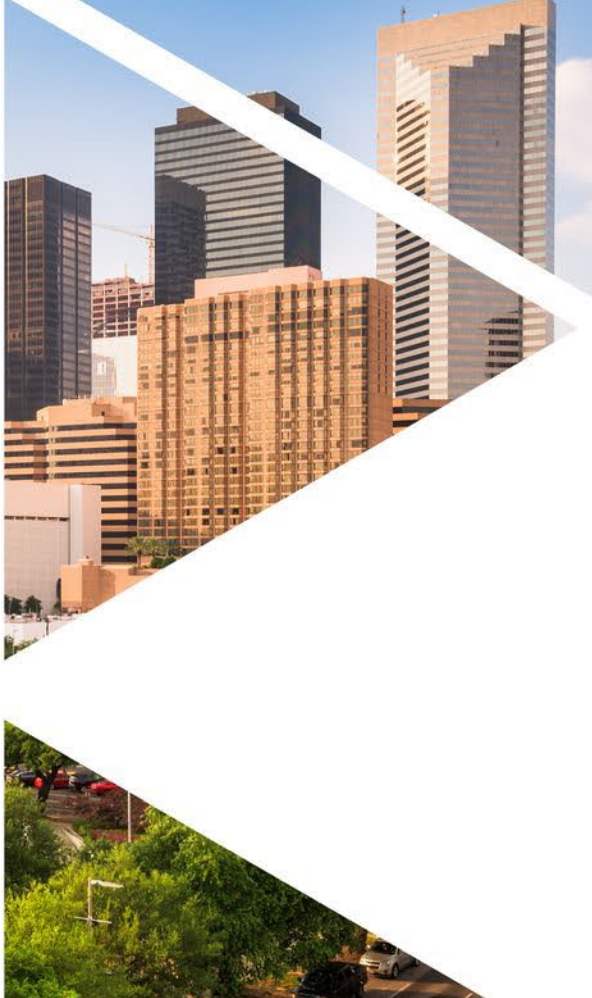
REGIONAL ECONOMIC
DEVELOPMENT ALLIANCE

Tuesday, February 25, 2025



Regional Project Pipeline Updates & Discussion

Craig Rhodes
SVP, Economic Development
Greater Houston Partnership



2025 Economic Development Wins

By the Numbers

5 Projects

820 New Jobs

\$1.87 Billion Capex

Domestic - 2 Int'l - 3

Energy Transition



Life Sciences



Manufacturing



Regional Economic Development

Announcements - January 2025



Summit Next Gen, a sustainable aviation fuel manufacturer, is opening a SAF plant along the Houston Ship Channel. The project will involve around \$1.6B in capital investment and create 300 jobs.

“Summit Next Gen is thrilled to advance its development of the **world’s largest** ethanol-to-jet sustainable aviation fuel production facility,” said **Summit Next Gen Chief Executive Officer Robert Halpin**.

“Strategically located on the Houston Ship Channel, this new production facility enables Summit Next Gen to leverage the existing large-scale **energy infrastructure** required to better serve our customers’ demands, and most importantly, access to the deep network of **highly talented energy industry professionals** present in the Houston region.”

January 29, 2025

International Economic Development

Announcements - January

The logo for FOXCONN, featuring the word "FOXCONN" in a bold, blue, sans-serif font. A registered trademark symbol (®) is located at the top right of the letter "N".

Foxconn, an electronics manufacturer, is expanding their Houston presence. The project will create 300 jobs with \$225M in capital investment.

PRESS RELEASE February 24, 2025

Apple will spend more than \$500 billion in the U.S. over the next four years

Teams and facilities to expand in Michigan, Texas, California, Arizona, Nevada, Iowa, Oregon, North Carolina, and Washington

Plans include a new factory in Texas, doubling the U.S. Advanced Manufacturing Fund, a manufacturing academy, and accelerated investments in AI and silicon engineering

As part of this package of U.S. investments, Apple and *partners* will open a **new advanced manufacturing facility in Houston** to produce servers that support Apple Intelligence, the personal intelligence system that helps users write, express themselves, and get things done.



International Economic Development

Announcements - January



United Imaging, a medical imaging machinery manufacturer, is expanding to a second location in the Houston region. The project will involve \$20M in capital investment and create 100 jobs.

International Economic Development

Announcements - January

again

Again, a clean chemical manufacturer, is opening a chemical fermenting plant in Texas City. The project will create 20 jobs with \$25M in capital investment.

International Economic Development

Announcements - February

The image shows the Vestas logo in a bold, blue, italicized sans-serif font. The word "Vestas" is followed by a registered trademark symbol (®).

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



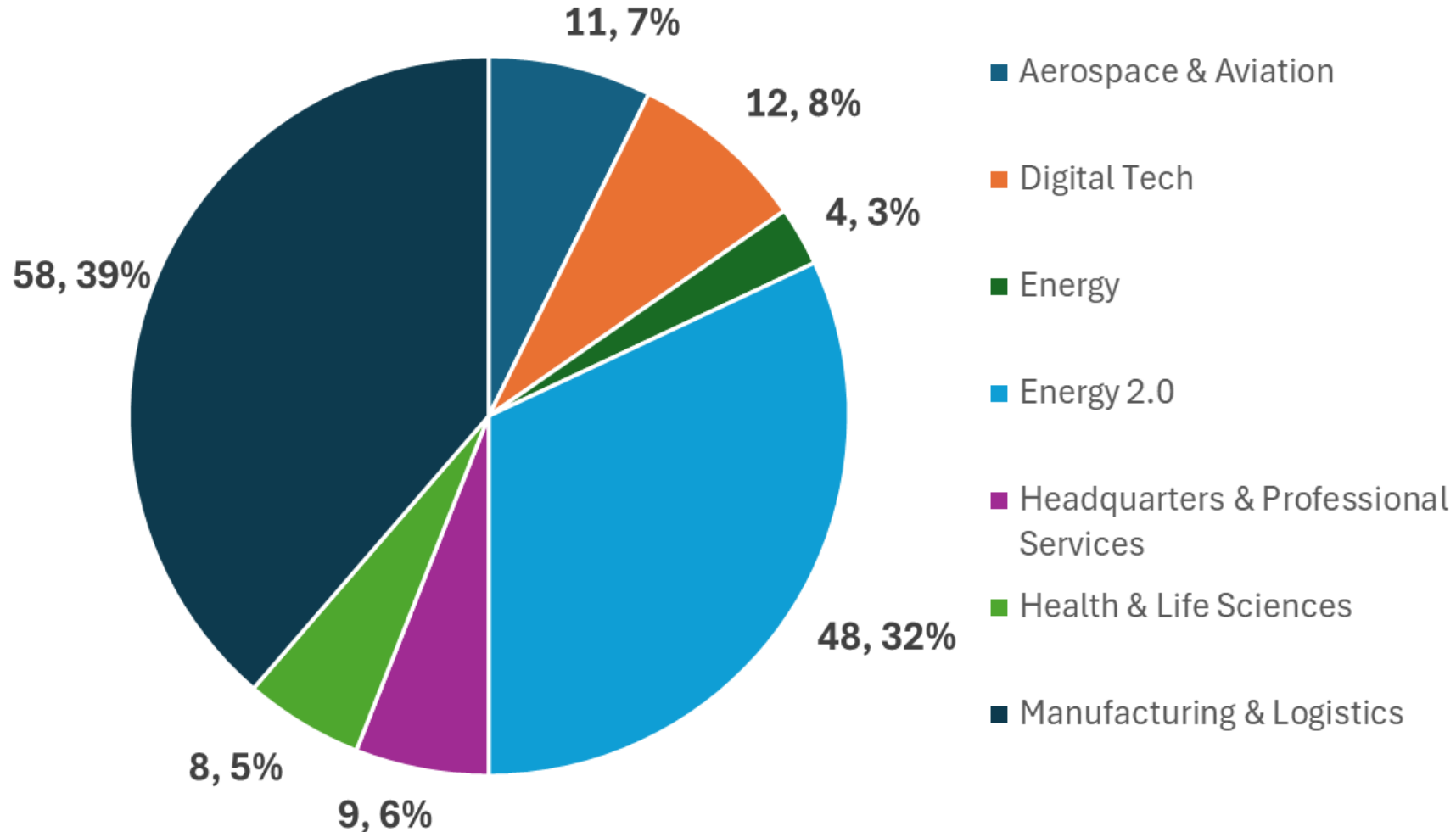
2025 Economic Development Wins

Project Names by Capex

1. Summit Next Gen – Project Summit
2. Foxconn – Project Rainbow
3. United Imaging – Project Rush
4. Again – Project Green Glow
5. Vestas – Project Wind

EDD Update: 2025 Project Pipeline

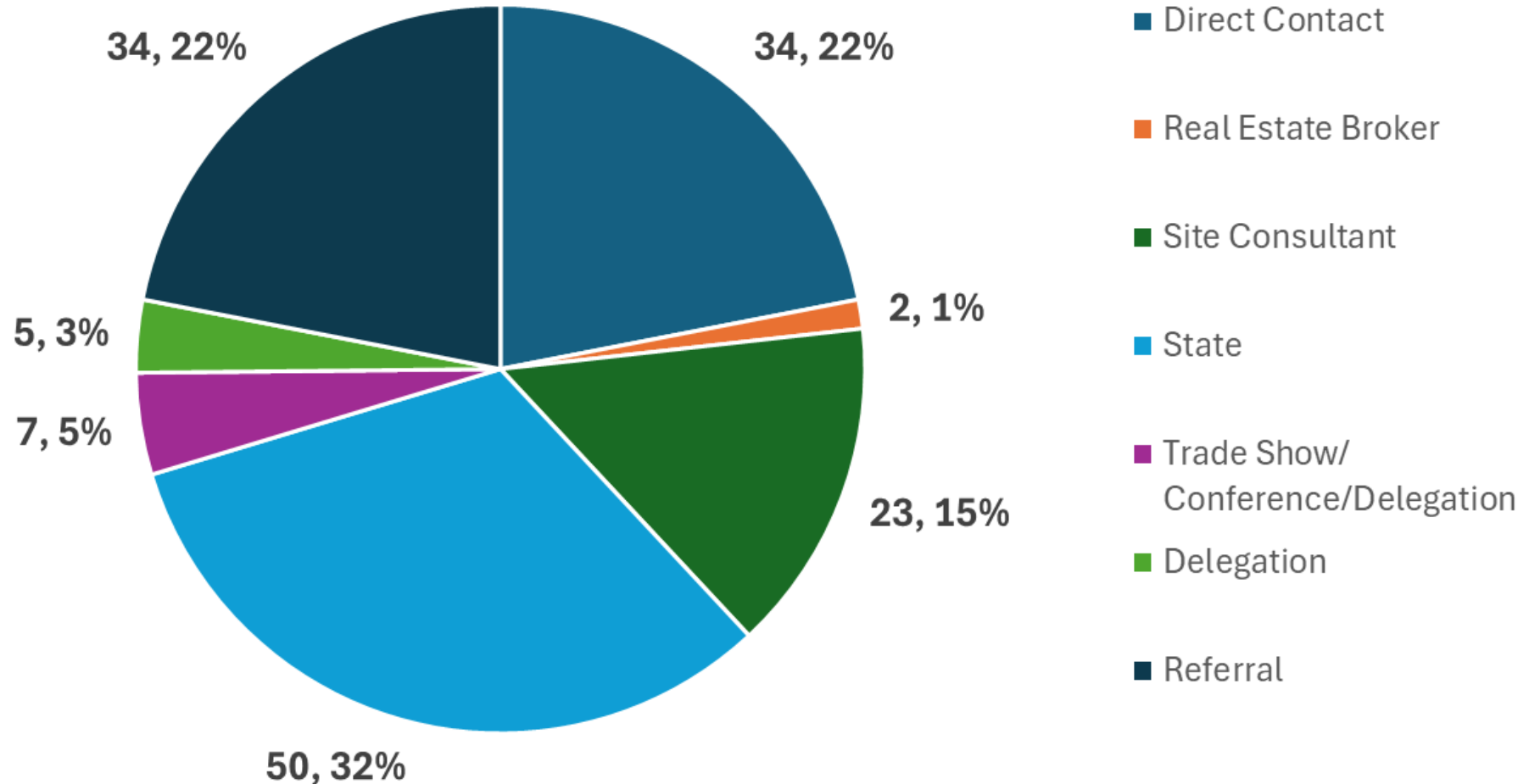
By Cluster



Project Pipeline: 150 projects; ~57,700 jobs; ~\$78.7 B Capex

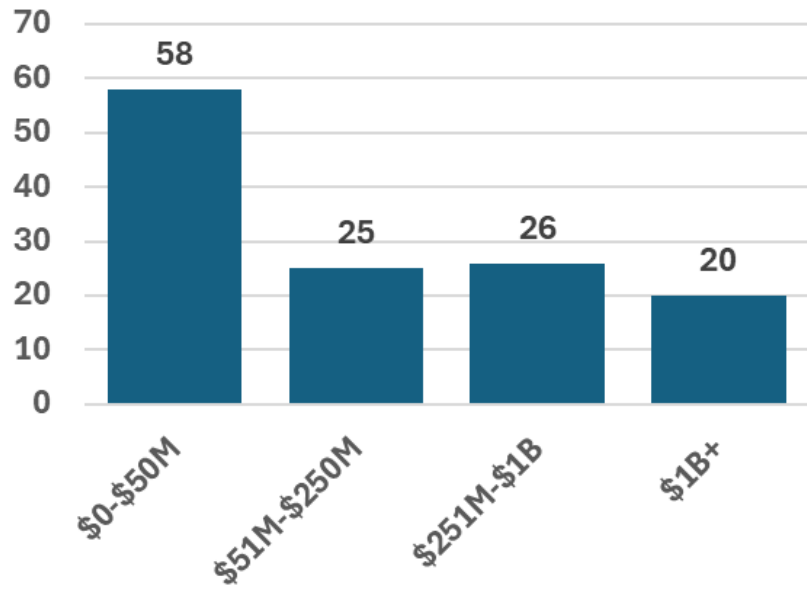
EDD Update: 2025 Project Pipeline

By Lead Source

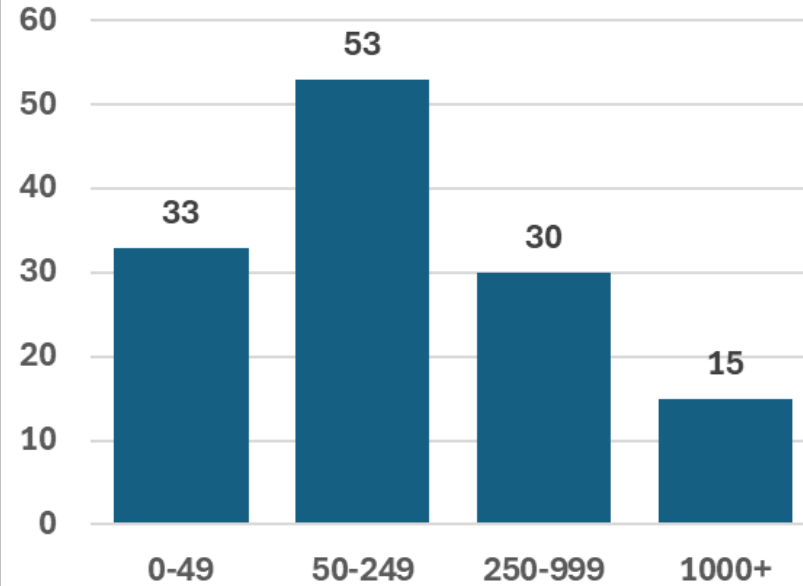


EDD Update: 2025 Project Pipeline

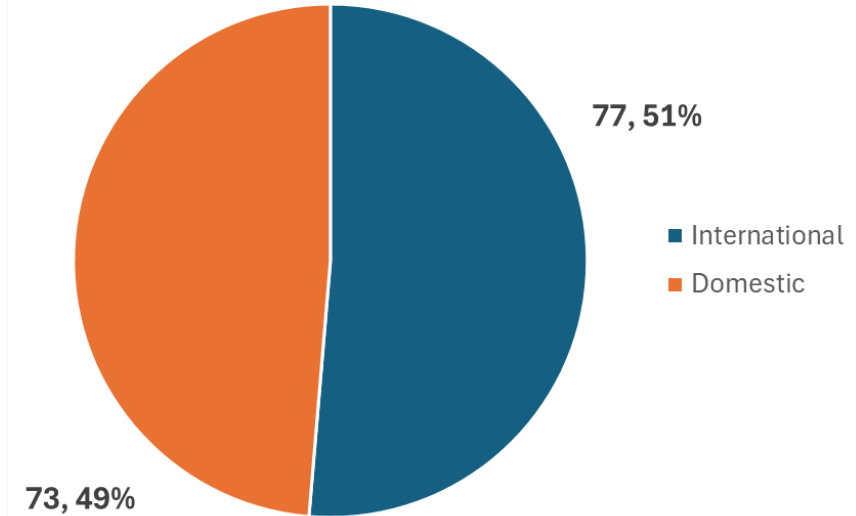
Projects by Capex



Projects by Jobs

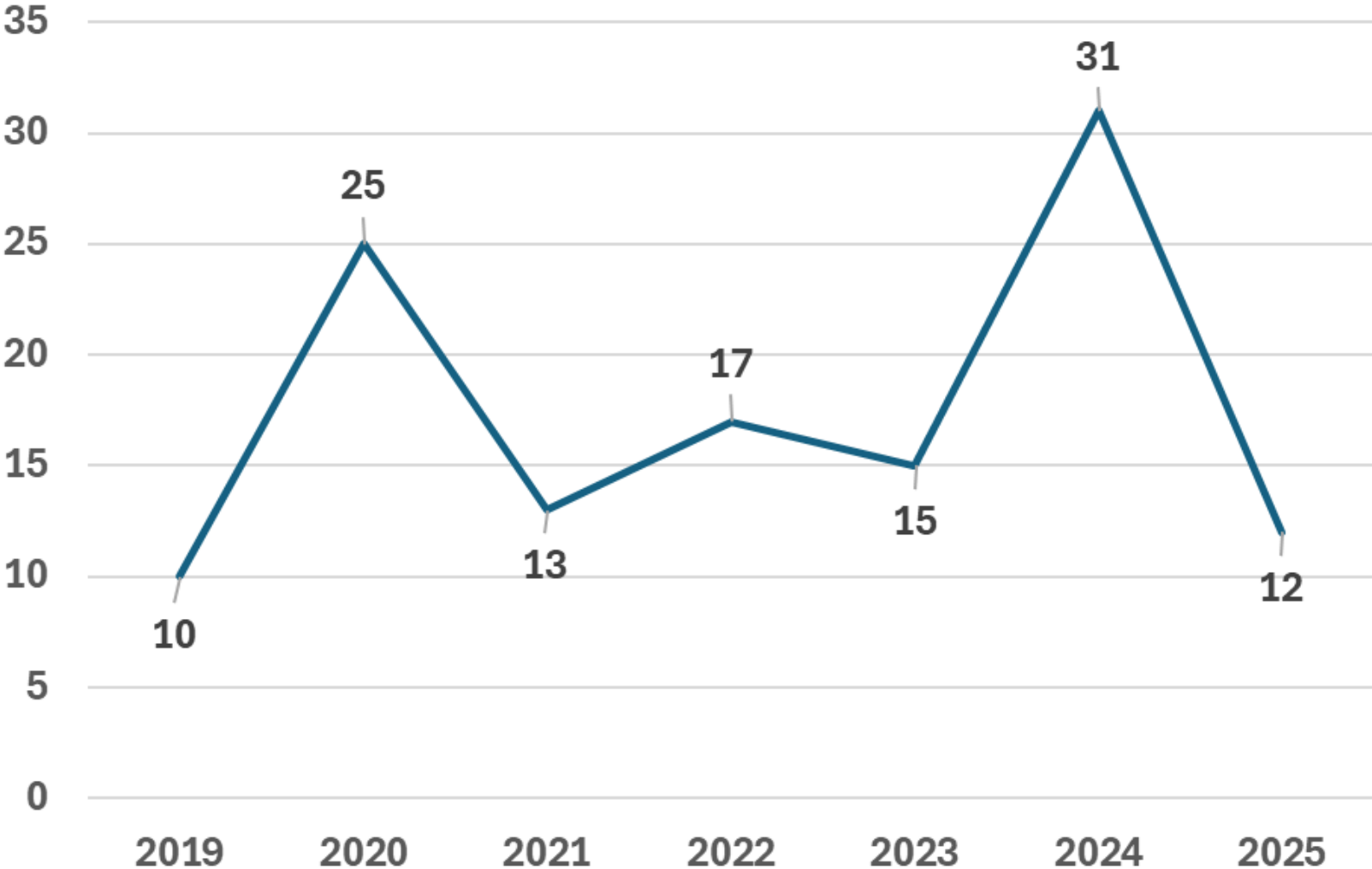


Project Origin



EDD Update: 2025 Project Pipeline

2025 New Project: January



2022 Population Under 18, Top 50 Metro Areas by Total Population

Rank	Geographic Area Name	Total Population	Population under 18	Share of Population under 18
1	New York-Newark-Jersey City, NY-NJ-PA Metro Area	19,617,869	4,103,565	20.9%
2	Los Angeles-Long Beach-Anaheim, CA Metro Area	12,872,322	2,638,302	20.5%
3	Chicago-Naperville-Elgin, IL-IN-WI Metro Area	9,442,159	2,055,667	21.8%
4	Dallas-Fort Worth-Arlington, TX Metro Area	7,943,685	1,972,352	24.8%
5	Houston-The Woodlands-Sugar Land, TX Metro Area	7,340,118	1,888,093	25.7%
6	Washington-Arlington-Alexandria, DC-VA-MD-WV Metro Area	6,373,829	1,429,622	22.4%
7	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metro Area	6,241,164	1,316,543	21.1%
8	Atlanta-Sandy Springs-Alpharetta, GA Metro Area	6,222,908	1,450,287	23.3%
9	Miami-Fort Lauderdale-Pompano Beach, FL Metro Area	6,139,340	1,211,157	19.7%
10	Phoenix-Mesa-Chandler, AZ Metro Area	5,015,678	1,120,135	22.3%

5-Year Change, Population Under 18, Top 50 Metro Areas by Total Population

Rank	Geographic Area Name	Under 18, 2017	Under 18, 2022	Growth, Absolute	Growth, Percent
1	New York-Newark-Jersey City, NY-NJ-PA Metro Area	4,375,625	4,103,565	-272,060	-6.2%
2	Los Angeles-Long Beach-Anaheim, CA Metro Area	2,930,904	2,638,302	-292,602	-10.0%
3	Chicago-Naperville-Elgin, IL-IN-WI Metro Area	2,193,632	2,055,667	-137,965	-6.3%
4	Dallas-Fort Worth-Arlington, TX Metro Area	1,939,727	1,972,352	32,625	1.7%
5	Houston-The Woodlands-Sugar Land, TX Metro Area	1,843,574	1,888,093	44,519	2.4%
6	Washington-Arlington-Alexandria, DC-VA-MD-WV Metro Area	1,429,710	1,429,622	-88	0.0%
7	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metro Area	1,329,077	1,316,543	-12,534	-0.9%
8	Atlanta-Sandy Springs-Alpharetta, GA Metro Area	1,456,176	1,450,287	-5,889	-0.4%
9	Miami-Fort Lauderdale-Pompano Beach, FL Metro Area	1,252,188	1,211,157	-41,031	-3.3%
10	Phoenix-Mesa-Chandler, AZ Metro Area	1,144,267	1,120,135	-24,132	-2.1%

**Houston's
Under 18
population
is growing**

Legislative Session Update

Glen Austin

Director, Public Policy

Greater Houston Partnership

★ 89TH

Texas Legislative
Session



GREATER HOUSTON
PARTNERSHIP.

Making Houston Greater.



EXECUTIVE PRIORITIES

PUBLIC SCHOOL ACCOUNTABILITY & FUNDING

A strong and transparent public education system is critical to the long-term prosperity of our region and state. The Partnership supports fully funding public education, preserving high-impact programs, and maintaining a strong system of accountability.



WATER INFRASTRUCTURE

Reliable and sustainable water infrastructure are key aspects of a thriving economy and require ongoing investments to meet growing demand. The Partnership supports significant state investments into water infrastructure to address both supply and improvement of aging and deteriorating water and wastewater systems.



WORKFORCE DEVELOPMENT

The key to economic growth is aligning workers' skills with the needs of industry. The Partnership supports measures across various industries that enhance collaboration between education institutions and industry resulting in more skilled workers with clear pathways to high-quality jobs.



Public School Funding

Budget	Total
Total Funding	\$75.1B
Total Funding above 24-25 State Funds	\$10.9B
Total New Funding (26-27)	\$4.85B

Budget	Senate	House
Teacher Incentive Allotment	\$750M	Undefined
Teacher Pay Raises	\$1.5B	Undefined
School Safety	\$200M	\$200M

Partnership Priority	
Student Success Allotment	\$200M

Water Infrastructure Funding

Budget	Senate	House
Total New Funding	\$3.5B	\$3.5B
Budget Appropriation	\$2.5B	\$2.5B
TBD Constitutionally Dedicated Source	\$1.0B	\$1.0B

Partnership Priority	
Eligible Use – Supply Projects	80%
Eligible Use – Infrastructure Projects	10%
Eligible Use - Flood Mitigation	10%

Workforce Development

Bill No.	Author	Description
HB 20	Gates	Establishes the Applied Sciences Pathway program*
SB 462	Kolkhorst	Prioritizes children of childcare workers for childcare wait lists
SB 26	Creighton	Teacher's Bill of Rights (Pay raises, expanding TIA, liability protection, TRS fixes)
SB 757	Middleton	Requires detailed review and evaluation of Higher Education degree programs

Still to come:

- Defining credentials of value – HB8
- Data modernization – HB8
- Early Childhood Education tri-share program

Energy Economic Benchmarks

Sara Muhammad Malik

Sr. Director, Global Energy Transition

Greater Houston Partnership





Benchmarking Energy incentives

Insights for Regional
Economic
Development

Working Draft



Disclaimer

This benchmarking analysis is intended for informational and discussion purposes only.

The findings are based on publicly available data as of December 2024.

While every effort has been made to ensure accuracy, incentives analyzed may have changed.

This presentation is not an official recommendation and is not an official position of the Greater Houston Partnership or any affiliated organization.

Please do not share externally without prior approval.



This benchmarking analysis compares Texas against other U.S. regions...where energy is a key driver of economic activity

1 Scope & Objective

This analysis aims to identify opportunities for the Greater Houston region by comparing its energy policies and incentives with other states. Understanding what other regions are doing well helps us refine strategies to maintain Texas / Houston’s leadership in energy and attract more investments.

2 Structure of the analysis

Regions benchmarked: **(1)** California, **(2)** Louisiana, **(3)** North Carolina, **(4)** Illinois, and **(5)** Georgia. These states were chosen due to their active energy economies and policies influencing investment decisions

3 Metrics Evaluated

Analyzed each region’s economic development incentives (grants, tax credits, and workforce programs) and energy-specific incentives (support for EVs, renewables, and emissions reduction projects) to assess how Texas compares

4 Scoring System (1-10 Scale)

Each region was scored on a 1-10 scale based on the availability of grant and incentive programs. Higher scores indicate stronger presence of programs

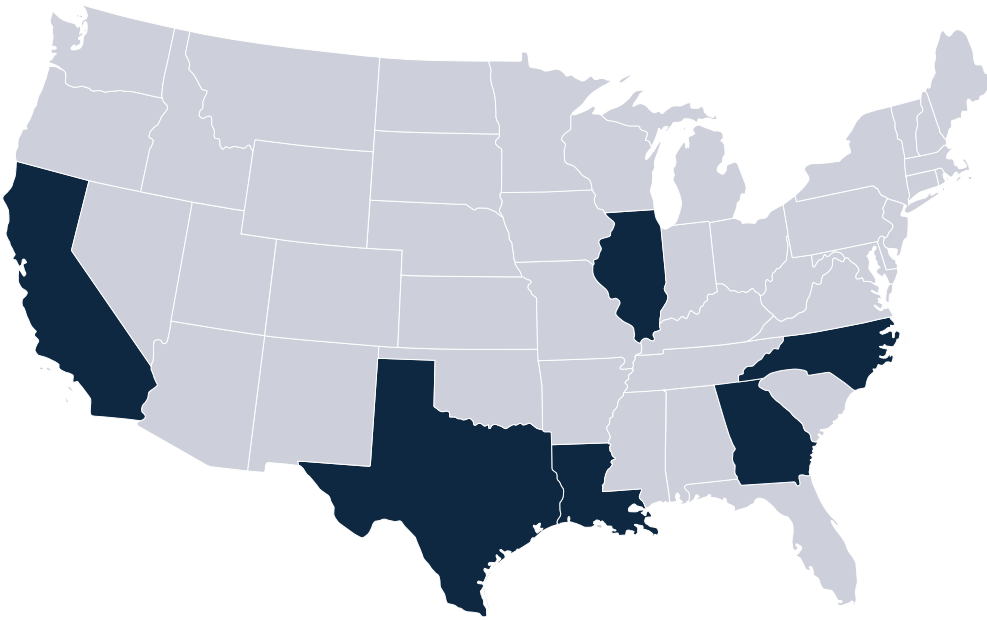
Note: This presentation is for internal discussion within the Houston Regional Economic Development Allies network. The findings reflect an ongoing analysis of economic incentives and business development strategies. This is not an official position of the Greater Houston Partnership or any affiliated organization. Please do not share externally without prior approval

Key findings and a score breakdown...reveals Texas leads on business incentives whereas California is ranks high for energy specific programs



Business incentives

- Texas (8/10):**
 - Programs like the TEF & JETI program attract major investments
- Illinois (8/10):**
 - Strong R&D incentives, start-up focused incentives that aim for innovation etc.
- North Carolina (8/10):**
 - Job Development Investment Grants are effective
- Louisiana (7/10):**
 - Industrial Tax Exemption and Quick Start workforce programs support growth
- Georgia (6/10):**
 - Workforce-focused Georgia MATCH program benefits advanced manufacturing.
- California (5/10):**
 - Competitive tax credits but slightly less focus on general tax reduction



Energy specific incentives

- California (8/10):**
 - Best-in-class for EVs, clean transportation grants, and robust policies.
- Illinois (7/10):**
 - Targeted support for EV infrastructure, R&D, and energy transition.
- North Carolina (7/10):**
 - Strong clean energy economic development programs.
- Georgia (7/10):**
 - EV manufacturing credits and clean energy tax incentives.
- Texas (5/10):**
 - Less emphasis on specific energy programs compared to business incentives.
- Louisiana (5/10):**
 - Also lacks broad energy specific incentives

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Building on Strength...As Texas leads in business incentives, let's Improve visibility for greater impact while highlighting our pro-growth mindset

  Let's start with 'quick-wins', i.e., where Texas does well



Business incentives are strong:

- Programs like TEF & JETI make Texas highly competitive for manufacturing and energy firms.

Ease of Doing Business:

- The region offers streamlined permitting and strong regional support making it attractive for business investment.

Regional Leadership highlights:

- Taking example of the BESS League City's ordinance and Texas City's site plan process, foster a pro-growth environment.



We need to highlight our strengths and success stories to maintain the region's competitive edge

Metrics	Texas	California	Illinois	Georgia	Louisiana	North Carolina
Business Grants / Incentives	<ul style="list-style-type: none"> >Texas Enterprise Fund (Grant) >Texas Semiconductor Innovation Fund (G) >Skills Development Fund (Grant) >Lone Star Workforce of the Future Fund (G) >Texas Jobs, Energy, Technology & Innovation (I) >Chapter 380 / 381 (I) >Research & Development Tax Credit (I) >Ad Valorem / Property Tax Exemption (I) 	<ul style="list-style-type: none"> >California Competes Tax Credit (CCTC) (I) (https://business.ca.gov/california-competes-tax-credit/) > Sales Tax Exclusion (STE) Program > Capital Investment Incentive Program (Ciip) Property Tax Rebate > Employment Training Panel - Training Reimbursement > New Employment Tax Credit (i) 	<ul style="list-style-type: none"> > Research and Development (R&D) Tax Credit > Building and Materials Tax Exemption (BMEC) and Utility Tax Exemption > Manufacturing Illinois Chips for Real Opportunity >Economic Development for a Growing Economy (EDGE) > Illinois Angel Investment Tax Credit Program > Employer Training Investment Program Incentive (ETIP) >High Impact Business Program (HIB) > Illinois Enterprise Zone Program 	<ul style="list-style-type: none"> >workforce development Georgia MATCH > New job growth >Georgia’s Job Tax Credit >Quality Jobs Tax Credit > R&D Georgia’s R&D Tax Credit >Data centers tax credit 	<ul style="list-style-type: none"> > Industrial Tax Exemption Program (ITEP) > Quality Jobs Program > LED FastStart >Enterprise Zone Tax Credit > Research and Development Tax Credit > Angel Investor Tax Credit > Louisiana Innovation Retention Program 	<ul style="list-style-type: none"> > Job Development Investment Grant > One North Carolina Fund >North Carolina Biotechnology Center > NC Small Business Program > workforce development grants > One North Carolina Fund
Clean Energy Incentives	<ul style="list-style-type: none"> >Energy-related, cost-reduction retrofit projects State Energy Program: Infrastructure Investment and Jobs Act Energy Efficiency Revolving Loan Fund Program > Energy Efficiency Energy Efficiency and Conservation Block Grant (EECBG) Program >Low cost long term financing Property Assessed Clean Energy (PACE) program > Hydrogen Hydrogen Fuel Cell Electric Vehicle (FCEV) and Infrastructure Grants >Emission Reduction Texas Emissions Reduction Grants 	<ul style="list-style-type: none"> >Transport: (California Grants Portal) Medium- and Heavy-Duty Public Charging Infrastructure Incentives EnergIIZE California Electric Vehicle Infrastructure Project (CALeVIP) Zero-Emission Vehicle (ZEV) Funding Opportunities Light-Duty Hydrogen Infrastructure Build-Out Charging and Refueling Infrastructure for Transport in California Provided Along Targeted Highway Segments (CRITICAL PATHS) > General: (California Grants Portal) Greenhouse Gas Reduction Loan Program (I) >Solar related Self-Generation Incentive Program (SGIP) >Offshore wind Offshore Wind Energy Waterfront Facility Improvement Program (G) > Hydrogen: California Clean Energy Program (G) > Biomass: Forest Biomass To Carbon-Negative Biofuels Pilot Program (G) 	<ul style="list-style-type: none"> >Transportation Reimagining Electric Vehicles Electric Vehicle Rebate Charging Incentive Program > Infrastructure Green Infrastructure Grant Opportunities (GIGO) > Clean Energy Workforce Equitable Energy Future Grant Program (G) > energy efficiency Energy Efficiency and Conservation Block Grant (G) > Distributed generation Illinois Shines Program > Emissions reduction Driving a Cleaner Illinois Program 	<ul style="list-style-type: none"> >Transport Georgia EV Manufacturing credit Alternative Fuel School Bus Grants >Energy efficiency and renewable energy Georgia State Energy Program (SEP) Georgia’s Weatherization Assistance Program > Energy management programss Technical Assistance Program for Schools (TAPS) >Solar + storage resilient critical facilities Solar Resiliency Technical Assistance Program > Renewable Energy Property Tax Exemption >Biomass Sales and Use Tax Exemption Sales tax exemption for materials and equipment used in the construction of biofuel facilities in Georgia 	<ul style="list-style-type: none"> > Transport Louisiana Alternative Fuel Vehicle Incentives and Laws >Energy efficiency Energy Solutions Commercial & Industrial Program > Solar Louisiana solar property tax exemption > Jobs Provision for Green Jobs Tax Credit 	<ul style="list-style-type: none"> > Clean Energy Clean Energy Economic Development > Energy efficeincy Energy Efficiency Rebates > Solar EnergizeNC Program > Green fund North Carolina Green Business Fund

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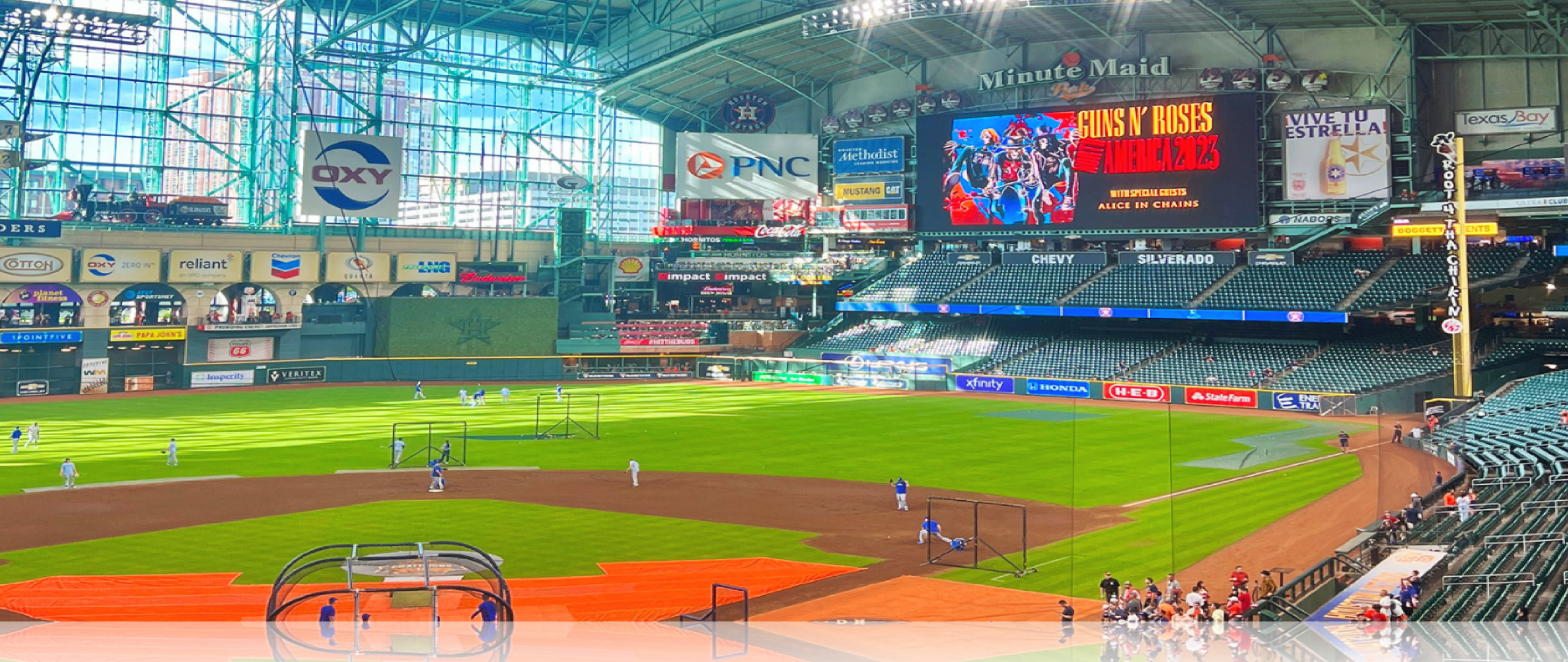
YTexas Summit Overview

Ed Curtis

Chief Executive Officer

YTexas





2025 YTexas Summit

September 23-24, 2025 | Daikin Park



YTexas is hosting our 2025 Summit: **The Official Texas Innovation Showcase** on Sept 23-24 at Daikin Park in Houston TX.

The Summit was coined “the South by Southwest for business” by the *Dallas Morning News*, where over 2,500 Texas business professionals and influencers convene to showcase innovators in Texas from over **10** industry sectors in technology, education, economic development - promoting why Texas the the **premier** destination to do business.

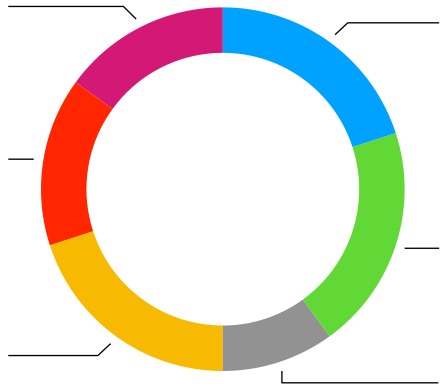
The **YTexas Summit** is a **marketplace** for companies, schools, and regions to promote groundbreaking projects to forge working relationships with peers across the state - and with those looking to relocate or invest here.

This **2-day event** will host a VIP reception followed by an all-day Summit throughout Daikin Park.

YTexas will host **regional events** in **Dallas** (Feb 19) and **Austin** (June 18) to provide a statewide experience for our sponsors. A community of 1,000+ Texas professionals can be accessed throughout the year via the **YTexas app**.



Who Attends



2024 YTexas Summit - Oct 1 at AT&T Stadium | Arlington, TX

Event Statistics

- ✓ 3,000 executive attendees
- ✓ 500 high-growth companies
- ✓ 10 Focused industry sectors

- ✓ 135 produced interviews/discussions
- ✓ 100 Innovation exhibits
- ✓ 50 ISDs, Colleges and Universities

2024 SPONSORS





Drew Pearson
Super Bowl Champion



Dennis Quaid
Actor



Norman Garza
Texas Space Commissioner



Jim Ross
Mayor of Arlington



General Miles Brown
Army Futures Command



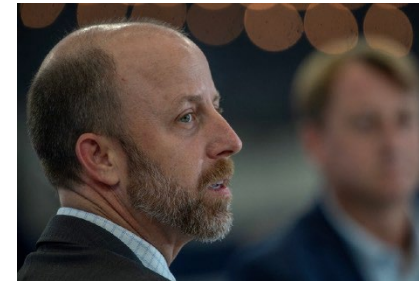
Dr. Iris Freemon
Dallas College



Nicholas Skytille
NASA



Camille
Dallas Cowboys Cheerleader



John Cowen
Mayor of Brownsville



ROUNDTABLES

Participate in roundtable discussions with industry peers addressing top issues such as:

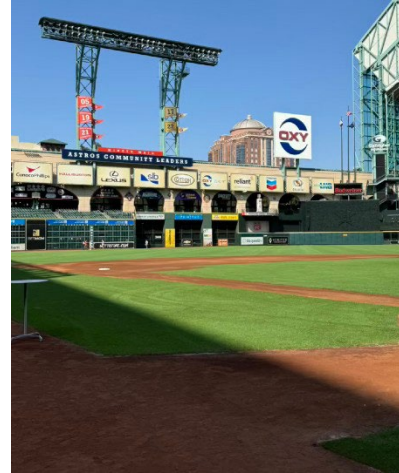
- Industry **trends**
- Workforce development
- **Innovation**
- Legislation
- and more



PITCH CONTESTS

Companies and students submit projects to the “Texas Innovation Pitch Contest”. Pitches include:

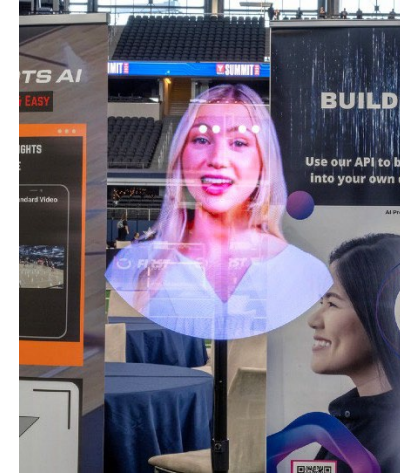
- **Solutions** to better Texas
- New products
- Regionalism
- Start-up **concepts**
- Enterprise **inventions**



VIP NETWORKING

The Summit & VIP reception will have exclusive networking experiences such as:

- **Jumbotron** viewing
- Insperity Club **VIP** buffet
- Diamond Club **reception**
- **Private** meeting space
- Cocktails and appetizers



EXHIBITOR SHOWCASE

Exhibitor showcases in stadium concourse overlooking the field in 10x10 - 20x20 sections:

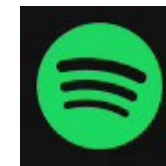
- Product demonstrations
- **Innovation** presentations
- **AI** and VR experiences
- **Celebrity** interaction
- Equipment & Hardware

YTEXAS COMMUNITY

Profile your community to over 10,000 professionals in the YTexas network. Meet in-person with peers across Texas, and stay up to date on events and news!

Follow YTexas on social media as we actively promote Texas communities and educational institutions assisting and attract investment in Texas.

- Over 1,500 executives active on the YTexas app representing businesses, trade associations, universities, state commissions and agencies
- Monthly Texas Insider email distribution to over 10,000 professionals in Texas
- LinkedIn impressions of 120,000+ with over 12,000 followers in 2024
- Weekly CEO Insider podcast on Spotify and Youtube with over 65 episodes and over 3,500 downloads



YTexas 2025 - Annual Summit/Event Schedule



- **Austin/Round Rock** – June 18, 2025 Legislative Review: Kalahari Resorts
- **Houston** – Sept 24, 2025 YTX Summit: Daikin Park (Home of the Astros)

Platinum Sponsor - \$100,000 (5 available)

- **Prominent** branding as a Platinum Sponsor at all YTexas 2025 events
- **Preferred** location for 20x20 exhibit and activation at all events
- **Speaking** opportunity on the main stage at the Summit
- **Marketing** package for full year: social media, website, community app & video interviews
- **VIP access** for 10 attendees at the Summit + profile on YTexas community app
- **Educational Sponsor** – industry workforce video for Texas high school & college students
- **Student Sponsor** – sponsor student admission to the Summit

Gold Sponsor - \$50,000 (10 available)

- **Significant** branding as a Gold Sponsor at all YTexas 2025 events
- **Preferred** location for 10x20 exhibit *and* activation at all events
- **Speaking** opportunity in breakout sessions at all events
- **Marketing** package for full year: social media, website, community app & video interview
- **VIP access** for 8 attendees to the Summit + profile on YTexas community app
- **Educational Sponsor** – industry workforce video for Texas high school & college students

Silver Sponsor - \$25,000 (10 available)

- **Branding** as a Silver Sponsor at all YTexas 2025 events
- **Exhibit** and speaking presentation at the Summit
- **Marketing** package for full year: social media, website, community app & video interview
- **VIP access** for 4 attendees at all events + profile on YTexas community app

Bronze Sponsor - \$10,000 (20 available)

- **Recognition** as a Bronze Sponsor at one YTexas 2025 event
- **Exhibit** or activation at one event
- **Logo** on conference ribbon board, YTexas website and community app
- **VIP access** for 2 attendees at all events + profile on YTexas community app

Partner - \$5,000 (20 available)

- **Recognition** as a VIP Sponsor at one YTexas 2025 event
- **Listing** on conference program, YTexas website and community app
- **VIP access** for 2 attendees at all events + profile on YTexas community app

**Thank you for
attending!**

