

WORLD CUP TEAM

HOUSTON

Trade Ties and Talking Points

March 16-20

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Houston and Germany: Trade, Business Ties

Overview

The Houston-Galveston Customs District is the fifth busiest gateway for U.S.-Germany trade (by value), and Germany is Houston’s sixth-largest international trading partner. Houston-Germany trade averaged \$12.6 billion per year over the last decade and was valued at \$16.1 billion in ’25. Over 8,000 people living in metro Houston were born in Germany.

Houston’s Business Ties

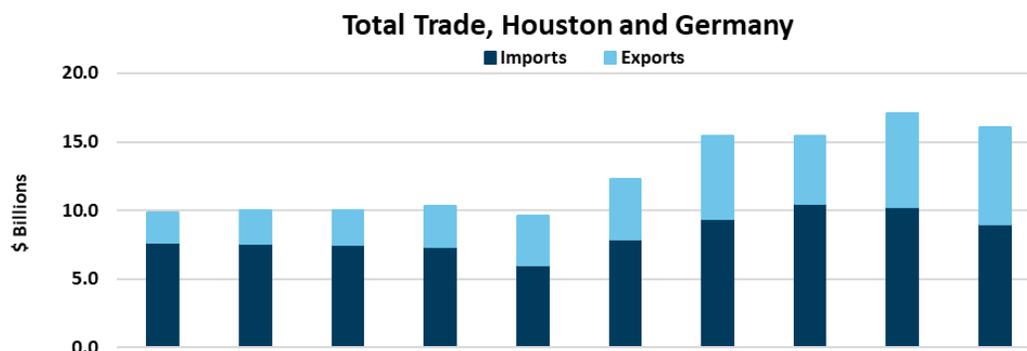
- Thirty-four Houston firms operate 68 subsidiary locations in Germany, including LyondellBasell Industries NV, Huntsman International LLC, Westlake Chemical Corporation, National Oilwell Varco, Inc. (NOV), and Vibrantz Technologies Inc.
- Eighty-eight German firms operate 145 subsidiaries in the Houston area. Germany’s subsidiaries rank fourth in the number of foreign-owned establishments, with the top industry of manufacturing representing 55.9 percent of these businesses. German parent companies include Brenntag GmbH, Hugo Boss AG, Siemens AG, BASF SE, and Deutsche Telekom AG.
- Trade and cultural relationships with Germany in Houston include the Consulate General of Germany, the German American Chamber of Commerce of the Southern U.S., and the Texas German Society.
- Two airlines – Lufthansa and United Airlines – offer an average of 20 weekly nonstop passenger flights from Houston to two cities in Germany, Frankfurt, and Munich.
- Leipzig, Germany was designated as one of Houston’s 19 international sister cities in 1992.

Air Cargo Trade

- Houston ranks as the tenth busiest gateway for U.S.-Germany air cargo trade (by weight).
- Air cargo trade between Houston and Germany totaled 15,478.2 metric tons in ’25, a 4.7 percent increase over ’24, and was valued at \$1.4 billion.
- In ’25, the top three commodities by weight were Industrial Equipment and Computers; Electrical Machinery, Equipment, and Parts; and Optic, Photographic, Measuring, Medical Instruments, accounting for 60.0 percent of total air cargo trade.

Total Trade

Houston–Germany trade has grown significantly over the past decade, rising from \$9.9 billion in ’16 to \$16.1 billion in ’25, just below the record \$17.1 billion reached in ’24. Trade declined 6.2 percent from ’24 as imports fell 12.5 percent to \$9.0 billion. Exports increased 3.3 percent to \$7.1 billion, driven by gains in pharmaceutical products and electrical machinery, equipment, and parts.



Source: Partnership analysis of U.S. Census Bureau, Foreign Trade Division data

Imports from Germany to Houston

Rank	Commodity	\$ Value, Millions		% of Total '25	% Change
		'24	'25		
1	Motor Vehicles and Parts	3,245.1	2,709.6	30.1	-16.5
2	Industrial Equipment and Computers	2,660.9	2,481.3	27.6	-6.7
3	Electrical Machinery, Equipment and Parts	853.9	796.6	8.9	-6.7
4	Plastics and Plastic Products	379.0	399.7	4.4	5.5
5	Optic, Photographic, Measuring, Medical Instruments	313.8	316.4	3.5	0.8
6	Articles of Iron or Steel	323.5	315.6	3.5	-2.5
7	Organic Chemicals	362.1	299.8	3.3	-17.2
8	Miscellaneous Chemical Products	322.4	176.8	2.0	-45.2
9	Precious Stones, Metals, Coins, Pearls	139.7	138.6	1.5	-0.8
10	Iron and Steel	165.3	106.5	1.2	-35.6
	Total Top 10 Commodities	8,765.8	7,741.0	86.1	-11.7
	All Other Commodities	1,510.2	1,252.6	13.9	-17.1
	TOTAL ALL COMMODITIES	10,276.0	8,993.7	100.0	-12.5

Source: Partnership analysis of U.S. Census Bureau, Foreign Trade Division data

Exports from Houston to Germany

Rank	Commodity	\$ Value, Millions		% of Total '25	% Change
		'24	'25		
1	Mineral Fuels, Oil and Refined Products	3,727.1	3,632.1	51.4	-2.6
2	Pharmaceutical Products	1,313.9	1,540.1	21.8	17.2
3	Electrical Machinery, Equipment and Parts	242.1	376.8	5.3	55.6
4	Industrial Equipment and Computers	230.4	253.1	3.6	9.9
5	Miscellaneous Chemical Products	169.9	206.6	2.9	21.6
6	Aircraft, Spacecraft and Parts	206.5	161.2	2.3	-21.9
7	Optic, Photographic, Measuring, Medical Instruments	156.3	153.9	2.2	-1.5
8	Organic Chemicals	148.9	146.5	2.1	-1.6
9	Plastics and Plastic Products	115.8	91.2	1.3	-21.3
10	Motor Vehicles and Parts	90.9	72.7	1.0	-20.0
	Total Top 10 Commodities	6,401.7	6,634.3	93.9	3.6
	All Other Commodities	436.3	428.5	6.1	-1.8
	TOTAL ALL COMMODITIES	6,838.1	7,062.8	100.0	3.3

Source: Partnership analysis of U.S. Census Bureau, Foreign Trade Division data

Houston and Portugal: Trade, Business Ties

Overview

The Houston-Galveston Customs District is the third busiest gateway for U.S.-Portugal trade (by value) and Portugal is Houston’s 60th largest international trading partner. From ‘16 to ‘25, trade between Houston and Portugal averaged \$783 million annually and was valued at \$830 million in ‘25. More than 870 people living in metro Houston were born in Portugal.

Houston’s Business Ties

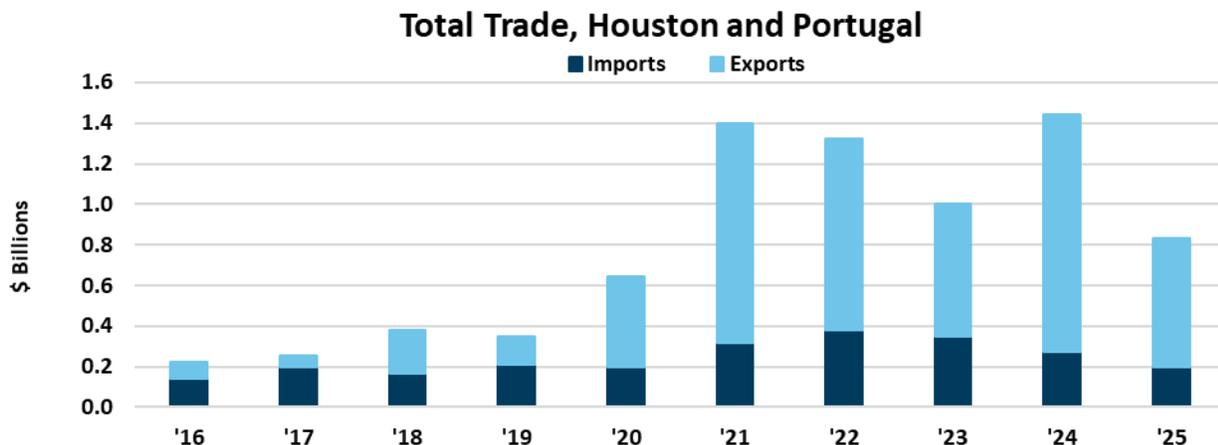
- Three Houston firms operate three subsidiary locations in Portugal, including American Bureau of Shipping (ABS), Hewlett Packard Enterprise (HPE), and Vibrantz Technologies Inc.
- Trade and cultural relationships with Portugal are facilitated in Houston through the Consulate General of Portugal and InterNations.

Air Cargo Trade

- Houston ranks as the 16th busiest gateway for U.S.-Portugal air cargo trade (by weight).
- Air cargo trade between Houston and Portugal totaled 131.0 metric tons in ‘25, a 35.0 percent decrease over ‘24, and was valued at \$8.9 million.
- In ‘25, the top three commodities by weight were Industrial Equipment and Computers, Cork and Cork Products, and Knitted or Crocheted Apparel and Accessories, accounting for 34.0 percent of the total air cargo value.

Total Trade

Houston–Portugal trade has grown significantly over the past decade, rising from \$219 million in ‘16 to a peak of \$1.4 billion in both ‘21 and ‘24. Trade declined sharply in ‘25, falling 45.8 percent from \$1.4 billion to \$830 million, largely due to a decrease in the import and export value of Mineral Fuels, Oil and Refined Products.



Source: Partnership analysis of U.S. Census Bureau, Foreign Trade Division data

Imports from Portugal to Houston

Rank	Commodity	\$ Value, Millions		% of Total	% Change
		'24	'25	'25	
1	Rubber and Rubber Products	37.0	44.1	22.3	19.0
2	Industrial Equipment and Computers	22.4	42.8	21.6	91.0
3	Articles of Iron or Steel	35.4	18.6	9.4	-47.5
4	Electrical Machinery, Equipment and Parts	30.7	15.7	8.0	-48.7
5	Furniture, Bedding, Lamps	7.3	10.2	5.2	40.2
6	Products of Stone, Plaster, Cement, Asbestos, Mica	8.9	9.4	4.8	5.3
7	Paper and Paperboard Articles	9.6	9.2	4.7	-4.1
8	Iron and Steel	15.2	7.5	3.8	-50.8
9	Ceramic Products	5.0	5.8	2.9	14.4
10	Wadding, Felt, Yarn, Twine, Ropes	4.8	4.3	2.2	-9.0
Total Top 10 Commodities		176.2	167.5	84.8	-5.0
All Other Commodities		97.5	30.0	15.2	-69.2
TOTAL ALL COMMODITIES		273.8	197.5	100.0	-27.9

Source: Partnership analysis of U.S. Census Bureau, Foreign Trade Division data

Exports from Houston to Portugal

Rank	Commodity	\$ Value, Millions		% of Total	% Change
		'24	'25	'25	
1	Mineral Fuels, Oil and Refined Products	1,047.0	476.6	75.4	-54.5
2	Organic Chemicals	40.4	72.0	11.4	78.1
3	Plastics and Plastic Products	44.0	42.5	6.7	-3.5
4	Oil Grain, Seed, Fruit, Plant Seeds	0.4	14.8	2.3	3,874.7
5	Industrial Equipment and Computers	4.4	4.8	0.8	8.4
6	Inorganic Chemicals, Rare Earths, Precious Metals	10.8	4.4	0.7	-59.4
7	Aircraft, Spacecraft and Parts	6.0	3.6	0.6	-39.3
8	Cotton Woven Fabrics	4.7	3.5	0.6	-25.3
9	Motor Vehicles and Parts	0.5	2.0	0.3	307.1
10	Miscellaneous Chemical Products	1.0	1.2	0.2	15.7
Total Top 10 Commodities		1,159.3	625.4	98.9	-46.1
All Other Commodities		6.5	6.8	1.1	5.3
TOTAL ALL COMMODITIES		1,165.8	632.2	100.0	-45.8

Source: Partnership analysis of U.S. Census Bureau, Foreign Trade Division data

Houston and Netherlands: Trade, Business Ties

Overview

The Houston-Galveston Customs District is the number one busiest gateway for U.S.-Netherlands trade (by value) and the Netherlands is Houston’s largest international trading partner. Houston-Netherlands trade averaged \$17.0 billion per year over the last decade and was valued at \$32.7 billion in ‘25. Almost 1,800 people in metro Houston were born in the Netherlands.

Houston’s Business Ties

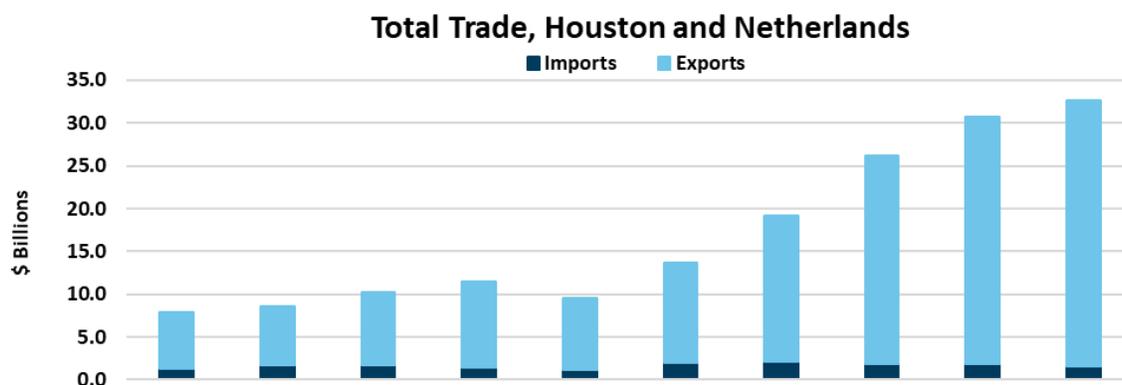
- Thirty-one Houston firms operate 55 subsidiary locations in the Netherlands, including Team, Inc., LyondellBasell Industries NV, National Oilwell Varco, Inc. (NOV), Crane Worldwide Logistics LLC, and Bristow Group Inc.
- Forty-one Dutch firms operate 72 subsidiaries in the Houston area. The Netherlands ranks seventh in number of foreign-owned establishments, with manufacturing being the leading industry, accounting for 30.6 percent of these businesses. Companies include Eriks NV, Akzo Nobel NV, Fugro NV, Nouryon, and Tommy Hilfiger BV.
- Trade and cultural relationships with the Netherlands are facilitated in Houston through the Honorary Consul of the Netherlands, the Netherlands Business Support Office (NBSO-Texas), and Holland Club Houston.
- Two airlines, KLM and United Airlines, offer an average of 14 weekly nonstop passenger flights from Houston to Amsterdam, Netherlands.
- Of Houston’s 18 foreign-owned banks, one is from the Netherlands—ING Bank N.V.

Air Cargo Trade

- Houston ranks as the 12th busiest gateway for U.S.-Netherlands air cargo trade (by weight).
- Air cargo trade between Houston and the Netherlands totaled 7,134.7 metric tons in ‘25, a 6.7 percent decrease over ‘24, and was valued at \$997.9 million.
- In ‘25, the top three commodities by weight were Electrical Machinery, Equipment and Parts; Industrial Equipment and Computers; and Plastics and Plastic Products, accounting for 71.8 percent of total air cargo trade.

Total Trade

Houston–Netherlands trade has more than quadrupled over the past decade, rising from \$7.8 billion in ‘16 to \$32.7 billion in ‘25. Trade between Houston and the Netherlands grew 6.3 percent year-over-year, increasing from \$30.7 billion in ‘24 to \$32.7 billion in ‘25. This growth was driven primarily by a 5.2 percent increase in exports of mineral fuels, oil, and refined products, which rose from \$25.4 billion to \$26.7 billion.



Source: Partnership analysis of U.S. Census Bureau, Foreign Trade Division data

Imports from Netherlands to Houston

Rank	Commodity	\$ Value, Millions		% of Total '25	% Change
		'24	'25		
1	Industrial Equipment and Computers	400.7	422.6	26.2	5.5
2	Organic Chemicals	379.9	238.2	14.8	-37.3
3	Electrical Machinery, Equipment and Parts	143.5	187.7	11.6	30.7
4	Mineral Fuels, Oil and Refined Products	183.9	117.5	7.3	-36.1
5	Miscellaneous Chemical Products	99.0	99.7	6.2	0.8
6	Beverages, Spirits, and Vinegar	129.8	86.2	5.3	-33.6
7	Miscellaneous Industrial Components, Equipment and Parts	91.5	74.1	4.6	-19.1
8	Optic, Photographic, Measuring, Medical Instruments	67.9	60.3	3.7	-11.2
9	Paper and Paperboard Articles	24.1	55.3	3.4	129.3
10	Plastics and Plastic Products	50.4	41.1	2.5	-18.4
Total Top 10 Commodities		1,570.7	1,382.7	85.6	-12.0
All Other Commodities		329.8	232.1	14.4	-29.6
TOTAL ALL COMMODITIES		1,900.5	1,614.8	100.0	-15.0

Source: Partnership analysis of U.S. Census Bureau, Foreign Trade Division data

Exports from Houston to Netherlands

Rank	Commodity	\$ Value, Millions		% of Total '25	% Change
		'24	'25		
1	Mineral Fuels, Oil and Refined Products	25,398.7	26,725.8	86.1	5.2
2	Organic Chemicals	790.8	1,083.9	3.5	37.1
3	Beverages, Spirits, and Vinegar	233.4	682.3	2.2	192.3
4	Industrial Equipment and Computers	668.3	531.2	1.7	-20.5
5	Ores, Slag and Ash	381.1	390.4	1.3	2.4
6	Electrical Machinery, Equipment and Parts	147.9	343.5	1.1	132.3
7	Optic, Photographic, Measuring, Medical Instruments	208.4	226.2	0.7	8.5
8	Miscellaneous Chemical Products	211.5	209.5	0.7	-1.0
9	Plastics and Plastic Products	173.6	176.1	0.6	1.4
10	Motor Vehicles and Parts	97.6	157.6	0.5	61.4
Total Top 10 Commodities		28,311.4	30,526.4	98.3	7.8
All Other Commodities		525.9	517.3	1.7	-1.6
TOTAL ALL COMMODITIES		28,837.3	31,043.7	100.0	7.7

Source: Partnership analysis of U.S. Census Bureau, Foreign Trade Division data



World Cup – Team Houston Mission Talking Points

Houston specific talking points

The Port of Houston: A Strategic Gateway for Growth

- The Port of Houston remains the leading U.S. hub for energy, petrochemicals, and manufacturing exports — and is well-positioned to serve as a key logistics gateway for goods entering or leaving North America.
- While certain tariff measures have temporarily slowed import flows, Houston is responding with record investments in port modernization and infrastructure expansion, ensuring long-term competitiveness.
- As global supply chains evolve, Houston’s central location, multimodal connections, and advanced logistics capabilities make it a natural hub for reshoring and near-shoring efforts.
- These shifts can ultimately increase local manufacturing and investment, strengthening Houston’s role in the global trade ecosystem.

Houston Innovation and Startup Ecosystem

- Houston is a city with an incredible history of innovation. Changing the world is in our nature and our very DNA.
- From the home of human spaceflight and NASA’s Johnson Space Center to the world’s largest medical city, the Texas Medical Center, to the Energy Capital of the World that is leading the global energy transition, Houston is the city that chooses to take on humankind’s boldest challenges head-on.
- Over the past few years, entrepreneurs, investors, academic institutions, local government, and the corporate sector have come together to unite, grow, and promote Houston's startup ecosystem.
- These efforts have been laser focused on ensuring our region offers access to key talent, funding and customers, along with the robust support system needed for young startups to thrive. And the progress is staggering.
- Houston’s technology and innovation sector continues to expand, supported by established strengths in energy, life sciences, aerospace, and logistics.



- o The region is home to 154,905 tech workers representing 4.4 percent of the region's workforce, according to CompTIA.
- o In addition to dedicated innovation districts such as The Ion, there are 7,832 tech-related firms and more than 1,900 venture-backed startups.
- o These companies have received \$10.1 billion in venture capital funding over the last five years, including \$1.8 billion in '24, according to the financial database Pitchbook.
- o In '24, the most heavily invested industry for VC funding in Houston was Energy, which received \$716.2 million across 25 deals. Health Care followed with \$385.4 million across 68 deals, and Information Technology came in third with \$385.2 million in funding across 79 deals.

Energy Transition

- Houston is the headquarters and the intellectual capital for virtually every segment of the energy industry including exploration, production, transmission, marketing, supply, and technology.
- We have the talent and expertise to address the dual challenge: meeting global energy demand for affordable and reliable energy while lowering the world's carbon footprint.
- As global energy demand forecasts continue to show the ever-increasing need for energy, we know oil and gas will remain critical for many years to come.
- At the same time, we know an increasing share of the energy mix can and should come from natural gas along with wind, solar and other renewables.
- Houston is the only city in the world with the collective energy expertise and know-how to lead the transition to a cleaner, more efficient, and more sustainable low-carbon world.
- For decades, Houston companies have been focused on world-scale energy production and delivery in a cost-effective, environmentally responsible manner.
- As the Energy Capital of the World, Houston's world-class workforce understands the science, engineering and the other technical and commercial aspects of the global energy system and can help lead the global energy transition to a low-carbon world.
- The cross-section of Houston's scientific community is an embedded competitive advantage. It is through our already established strengths in areas like chemistry,



advanced materials, nanotechnology and geosciences that Houston can and will drive innovation.

- As renewable energy companies seek to scale their businesses, they have found Houston is uniquely suited to help develop and grow their companies largely because of our deep, energy-centric talent pool built around traditional energy activities.
- Houston is well-adept at:
 - Developing large-scale projects and platforms along with executing deals (this includes professional expertise in all finance and legal aspects of working major energy deals).
 - Operating large-scale projects located around the globe from Houston
 - Trading and all the commercial and marketing aspects.
 - Offering extensive back-office talent pool that is geared towards the unique needs of energy companies (HR, accounting, etc.)

Germany Talking Points

Global Trade Relationship

- The Houston–Galveston Customs District is the fifth busiest U.S. gateway for trade with Germany by value, underscoring Houston’s strategic importance in transatlantic commerce.
- Germany is Houston’s sixth-largest international trading partner, reflecting the depth and maturity of the relationship.
- Over the past decade, Houston–Germany trade averaged \$12.6 billion annually, reaching \$16.1 billion in 2025, just below the record \$17.1 billion in 2024.
- Since 2016, trade has grown from \$9.9 billion to \$16.1 billion, demonstrating sustained expansion and economic resilience.
- In 2025, exports to Germany increased 3.3%, driven by pharmaceutical products and advanced electrical machinery — a sign of strengthening high-value industrial exchange.
- Germany’s subsidiaries rank fourth among foreign-owned establishments in Houston, with manufacturing representing nearly 56% of these businesses.



- 88 German firms operate 145 subsidiaries in the Houston area, highlighting long-term investment and confidence in Houston’s business climate.

Innovation-Driven Air Cargo & High-Value Trade

- Houston ranks as the 10th busiest U.S. gateway for air cargo trade with Germany.
- In 2025, air cargo totaled 15,478 metric tons, valued at \$1.4 billion, reflecting a 4.7% year-over-year increase.
- The top commodities — industrial equipment, electrical machinery, and medical/optical instruments — account for 60% of total air cargo trade, highlighting the advanced and technology-driven nature of the partnership.
- Growth in pharmaceutical exports and electrical equipment further reflects alignment in high-tech, life sciences, and precision manufacturing sectors.

Global Connectivity and Cultural Ties

- More than 8,000 German-born residents live in metro Houston, contributing to the region’s diverse and globally minded workforce.
- Trade and cultural ties are supported locally by:
 - The Consulate General of Germany in Houston
 - The German American Chamber of Commerce of the Southern U.S.
 - The Texas German Society
- Direct connectivity strengthens business relationships, with Lufthansa and United Airlines offering approximately 20 weekly nonstop flights between Houston and Frankfurt and Munich.
- Houston’s sister-city partnership with Leipzig (established in 1992) reflects longstanding people-to-people and institutional ties.

Portugal Talking Points

Houston as a Key U.S. Gateway for Portugal



- The Houston–Galveston Customs District is the third busiest U.S. gateway for trade with Portugal by value, reinforcing Houston’s role as a critical connector between Portugal and the American market.
- Portugal ranks as Houston’s 60th largest international trading partner, demonstrating steady and meaningful commercial engagement.
- From 2016–2025, trade averaged \$783 million annually, reaching \$830 million in 2025.
- Over the past decade, bilateral trade grew substantially — rising from \$219 million in 2016 to peaks of \$1.4 billion in 2021 and 2024, reflecting the strength and scalability of the partnership.
- While trade moderated in 2025 due to shifts in mineral fuels and refined product values, the long-term trajectory shows resilience and growth potential.

Shared Strengths in Energy, Industry, and Innovation

- Both Houston and Portugal are recognized energy leaders:
 - Houston is the energy capital of the world, home to a globally integrated ecosystem across oil, gas, LNG, renewables, hydrogen, and carbon management.
 - Portugal is a European leader in renewable energy deployment, particularly wind and solar, with ambitious clean energy targets.
- The trade mix reflects this alignment:
- Key commodities include industrial equipment, computers, cork products, and apparel.
 - Energy-related trade, especially mineral fuels and refined products, has historically driven strong value growth.
 - Air cargo trade totaled 131 metric tons in 2025, valued at \$8.9 million, underscoring high-value industrial and specialty goods exchange.
- Houston firms with operations in Portugal — including American Bureau of Shipping (ABS), Hewlett Packard Enterprise (HPE), and Vibrantz Technologies Inc. — demonstrate strong corporate connectivity in maritime, technology, and advanced materials sectors.

Ports and Global Connectivity



- The Port of Houston is one of the busiest ports in the United States, serving as a major logistics hub for energy, petrochemicals, and containerized goods.
- Portugal’s Port of Sines serves as a strategic Atlantic gateway for Europe, strengthening transatlantic supply chains.
- Houston ranks as the 16th busiest U.S. gateway for air cargo trade with Portugal, further expanding high-value trade in advanced goods.
- Both regions leverage deepwater port access, global shipping lanes, and multimodal infrastructure to support scalable international trade.

Cultural and Community Connections

- More than 870 Portuguese-born residents live in the Houston metro area, contributing to the region’s cultural and economic vibrancy.
- Trade and cultural relationships are supported locally by the Consulate General of Portugal in Houston, which strengthens diplomatic, commercial, and cultural ties.

Netherlands

The #1 U.S. Gateway for Dutch Trade

- The Houston–Galveston Customs District is the number one busiest U.S. gateway for trade with the Netherlands by value.
- The Netherlands is Houston’s largest international trading partner, underscoring the strategic depth of the relationship.
- Over the past decade, bilateral trade averaged \$17.0 billion annually, reaching \$32.7 billion in 2025.
- Trade has more than quadrupled since 2016, growing from \$7.8 billion to \$32.7 billion, reflecting strong, sustained momentum.
- Year-over-year trade increased 6.3% from 2024 to 2025, driven primarily by growth in mineral fuels, oil, and refined product exports.

Energy & Maritime Leadership

- Both Houston and the Netherlands are global energy and maritime powerhouses:



- Houston serves as the energy capital of the United States and a global hub for oil, gas, LNG, and energy transition technologies.
- The Netherlands is home to the Port of Rotterdam, Europe’s largest seaport and a critical energy gateway for the continent.
- The growth in mineral fuels and refined product exports reflects deep alignment in energy infrastructure, trading capacity, and logistics expertise.
- Both regions are investing heavily in hydrogen, offshore wind, carbon management, and industrial decarbonization — creating new areas for collaboration.

Strong Two-Way Investment

- 31 Houston firms operate 55 subsidiary locations in the Netherlands.
- 41 Dutch firms operate 72 subsidiaries in the Houston area, ranking the Netherlands seventh in foreign-owned establishments locally.
- Manufacturing is the leading Dutch industry presence in Houston (30.6%), demonstrating shared strength in advanced production.
- Major Dutch companies with Houston operations include: Shell, Akzo Nobel, Boskalis International, ING Bank, Arcadis, KLM

High-Value Air Cargo & Technology Trade

- Houston ranks as the 12th busiest U.S. gateway for air cargo trade with the Netherlands.
- In 2025, air cargo totaled 7,134.7 metric tons, valued at nearly \$998 million.
- The top commodities — electrical machinery, industrial equipment and computers, and plastics — account for nearly 72% of total air cargo trade, underscoring advanced manufacturing and technology exchange.
- Direct connectivity supports trade flows, with KLM and United Airlines operating approximately 14 weekly nonstop flights to Amsterdam.

Institutional & Cultural Connectivity

- Nearly 1,800 Dutch-born residents live in metro Houston, contributing to a globally minded workforce.



- Trade and business relationships are supported locally through:
 - The Honorary Consul of the Netherlands
 - The Netherlands Business Support Office (NBSO-Texas)
 - Holland Club Houston