#Study

Transatlantic Economic Relations

Significance of transatlantic economic and trade relations between the USA and Austria

2026

accenture | AmCham Austria

Contents

Background & Objectives of the Study

- **Stable economic relations** between two or more partner countries, as well as a trade regime that interferes with trade as little as possible, are important factors for **successful cooperation** and for **increasing the prosperity** of the partners involved.
- Especially in times of high uncertainty and crises, a stable, **long-term cooperation** between economic partners is more important than ever.
- In addition to the European partners, the **USA** has become one of the **most important trade and economic partners for Austria**.
- The USA remains – despite numerous current transatlantic tensions – still the **second most important trade and export partner** for Austria, the most important outside the EU.
- At the same time, **free trade must be defended**, so that the stable framework conditions that have prevailed so far and are currently being put to the test continue to be maintained.
- For this reason, the American Chamber of Commerce, together with Accenture, has been publishing a series of studies since 2021 in which the **significance of transatlantic economic relations** is presented using figures and facts.
- The objectives of the current study are an **update of foreign trade figures**, the **documentation of potential trends and changes** as well as the presentation of the catalytic effects that US companies contribute to the structural change of the Austrian economy.

Results at a glance

The USA remain a key economic partner of Austria, even though goods trade declined significantly in 2025. Austrian **goods exports to the USA fell** from EUR 16.2bn in 2024 **to EUR 12.9 bn in 2025**, yet **the USA remain Austria's second most important export market**.

Services trade with the USA is developing significantly **more stably** and continues to gain importance. In 2025, services worth **EUR 3.7 bn were exported to the USA**, while in the same period **EUR 4.3 bn of US services were imported**. Business-related services, R&D and ICT play a central role here.

Investment relations between Austria and the USA remain significant. **US direct investments in Austria** continue to rise to **EUR 18.7 bn**, while **Austrian direct investments in the USA declined to EUR 22.8 bn** in 2025.

US companies continue to make a significant economic contribution in Austria. The top 50 US companies in Austria contribute 2.3% to GDP, secure around 142,000 employees directly and indirectly, and contribute around EUR 5.0 bn in taxes and levies.

US subsidiaries drive structural change in Austria: Their growth is clearly concentrated in technology- and industry-related sectors (high technology and transformers). US companies are thus a central driver and enabler of the technology-driven structural change and the innovative strength of Austria as a business location.

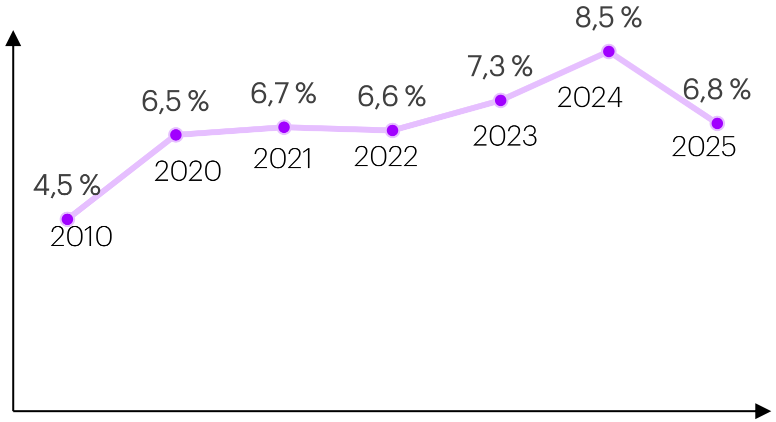
1 | Transatlantic trade and capital flows

Status Quo & Development

The USA remain Austria's second most important trading partner in 2025 – despite a decline of EUR 3bn

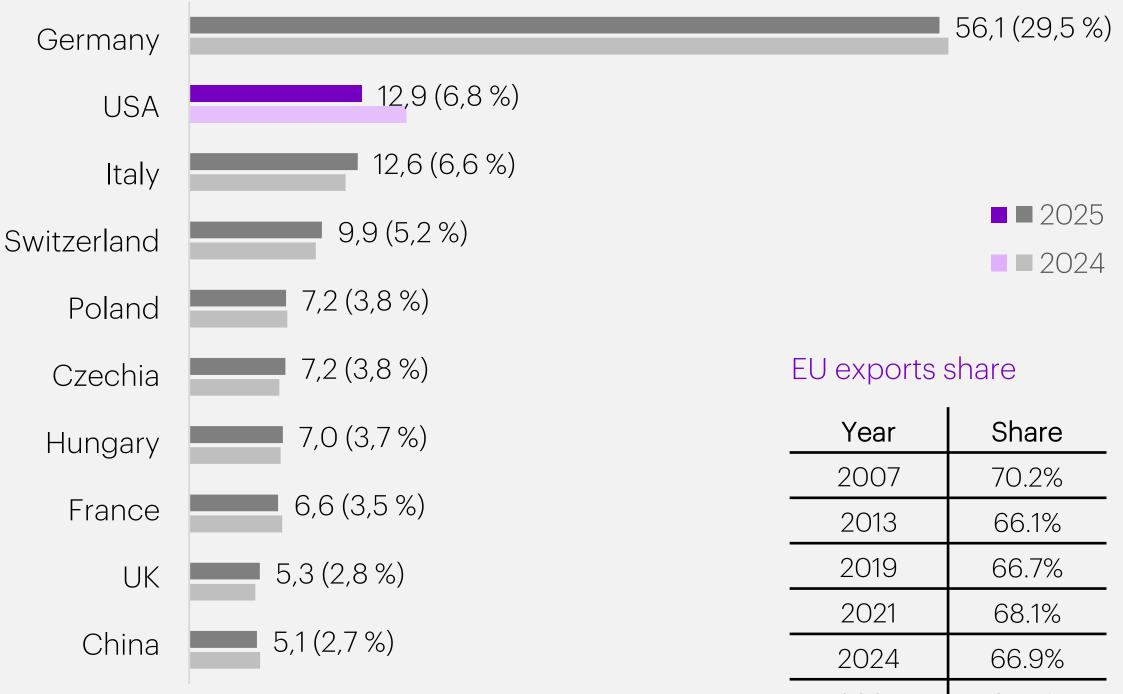
- Austrian companies exported goods in **2025** with a total value of **EUR 12.9 bn** to the USA – in 2024 it was EUR 16.2 bn.
- The **US share** of all exports from Austria fell to **6.8%** in **2025**, in 2024 it was still 8.5%. Although year-on-year **total exports were slightly declining, trade with the USA fell disproportionately (minus 20.4%; share: minus 1.7 ppt).**
- The USA thus remain **the second most important target market** for Austrian exports with a clearly **negative trend**.

Share US-Exports



Top 10 export countries

Goods exports from Austria 2025, in EUR bn (share of total exports)



EU exports share

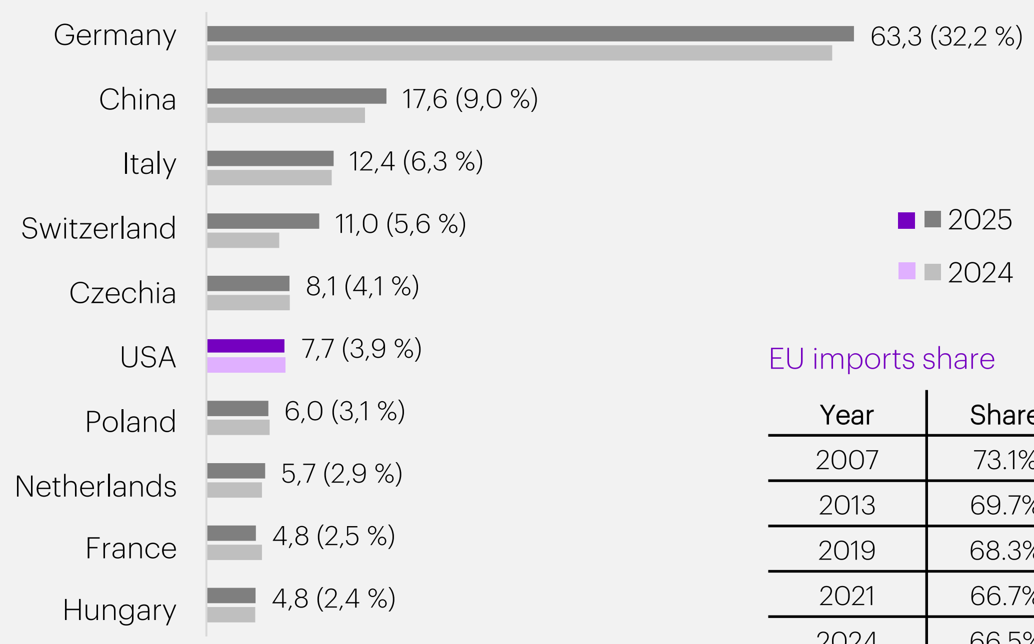
Year	Share
2007	70.2%
2013	66.1%
2019	66.7%
2021	68.1%
2024	66.9%
2025	**65.4%**

Source: Statistik Austria, Accenture Research
Note: Preliminary data for 2025

In 2025, Austria imported goods worth EUR 7.7 bn from the USA – the import share has fallen

Top 10 import countries

Goods imports to Austria 2025, in EUR bn (share of total imports)



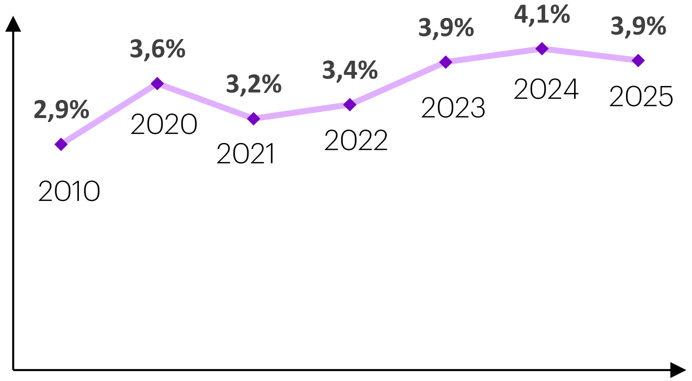
EU imports share

Year	Share
2007	73.1%
2013	69.7%
2019	68.3%
2021	66.7%
2024	66.5%
2025	65.4%

Source: Statistik Austria, Accenture Research
Note: Preliminary data for 2025

- In **2025 goods** worth **EUR 7.7 bn** were imported from the USA to Austria (2024: EUR 7.7 bn). Thus, **imports from the USA are stagnating**. Overall, Austria's imports rose by around 4% from 2024 to 2025.
- **3.9% of all Austrian imports** thus originated from the **USA**; from the EU come a total of 65.4% of all goods.
- The **significance** of the **USA as country of origin** for goods **is slightly declining** for Austria – in 2025 the USA are in **rank 6** of the most important countries of origin for **goods imports.**

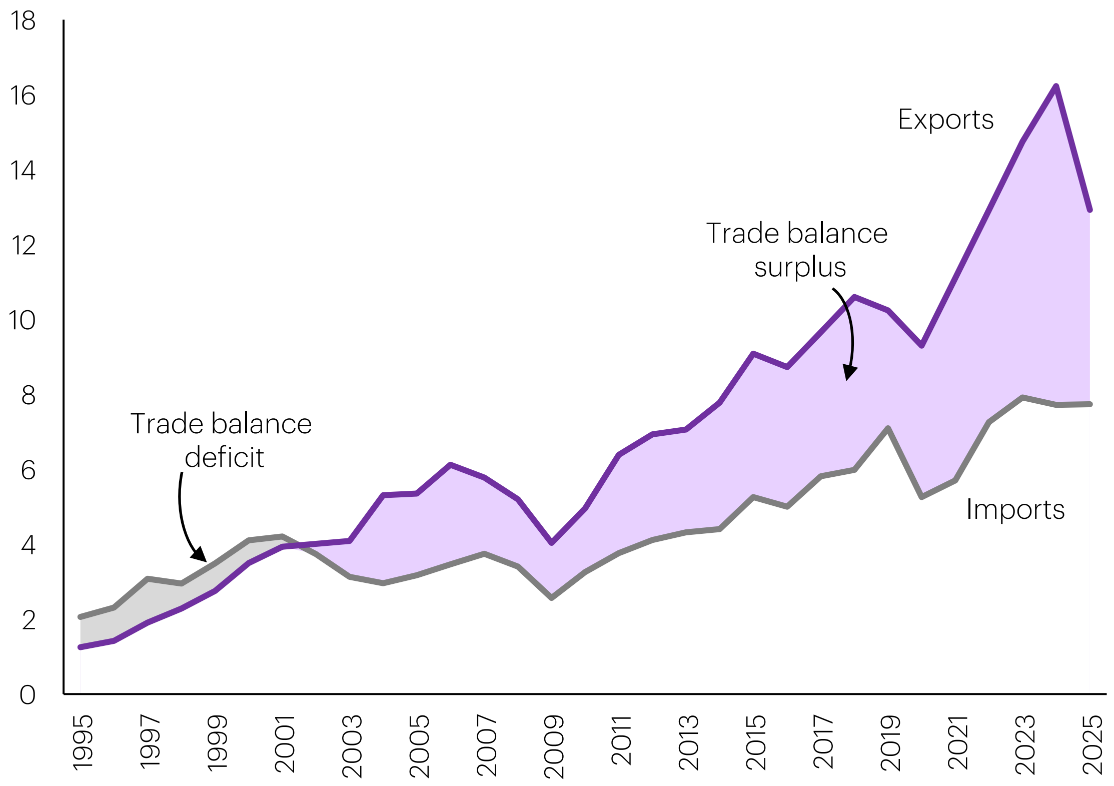
Share US-Imports



Despite a decline in trade, the USA remain one of the most significant trading partners in goods

Development of goods trade flows

between USA and Austria, from Austria's perspective, in EUR bn



- The USA remain **an important destination country for exports of** Austrian companies. Since 2023, **goods imports** from the USA have stagnated, while exports rose sharply until 2024 – from 2024 to 2025, however, a clear decline can be observed.
- The **trade balance surplus** that Austria has achieved since 2002 with the USA remains substantial in 2025 as well, although it has decreased. With **EUR 5.2 bn, Austria** still has a substantial trade balance surplus that exceeds those with **other countries**.

Top 3 positive vs. negative trade balances AT

Highest trade balance surpluses/deficits 2025, in EUR bn

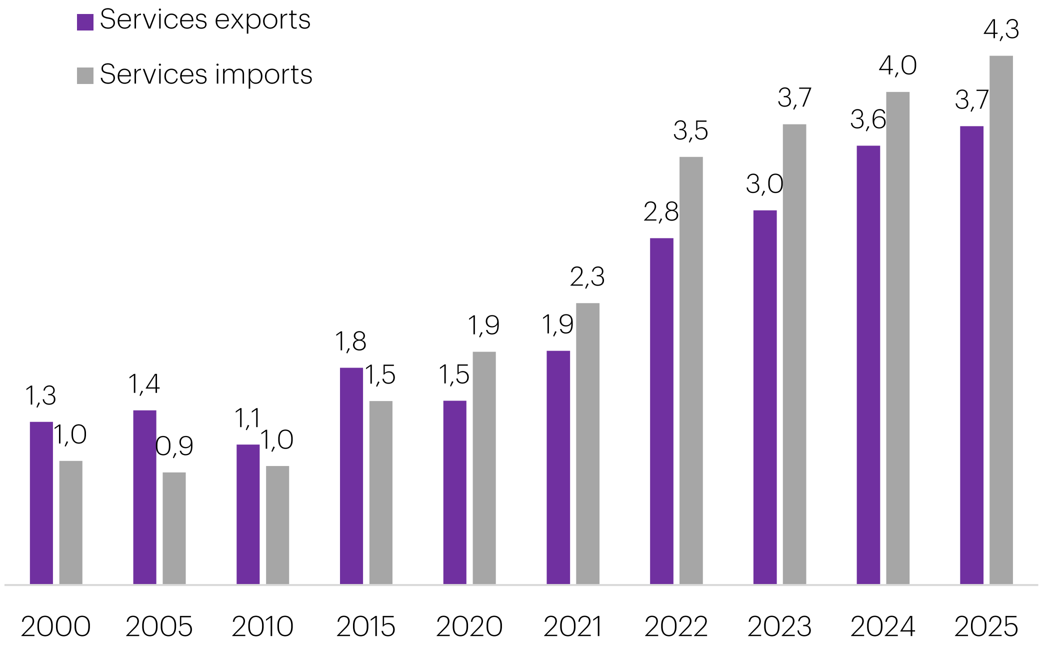
Positive trade balance	
USA	+5.2
UK	+2.9
Hungary	+2.2

Negative trade balance	
China	-12.5
Germany	-7.3
Kazakhstan	-2.0

Source: Statistik Austria, Accenture Research
Note: Preliminary data for 2025

Transatlantic trade in services also rises in 2025 – Austria is a net importer

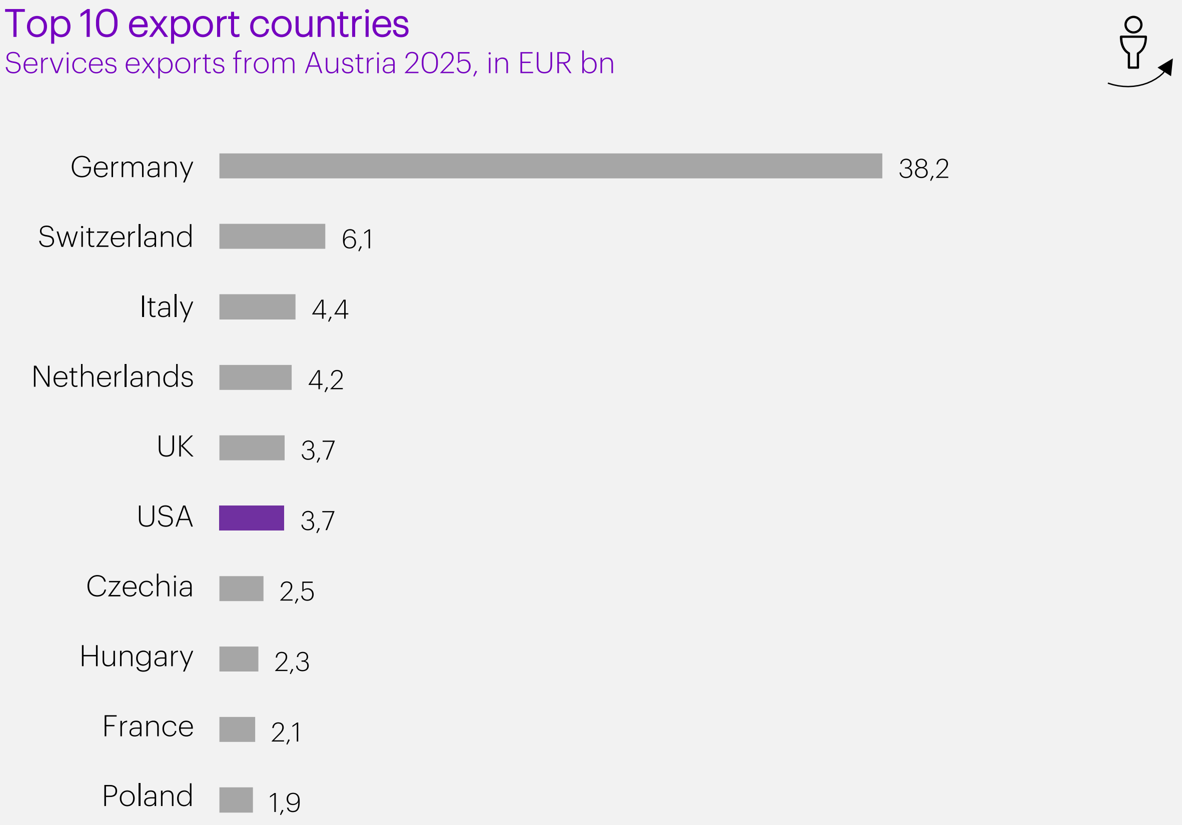
Development of services trade flows
between USA and Austria, from Austria's perspective, in EUR bn



Source: OeNB, Accenture Research

- The significance of the USA as a trading partner for the exchange of services has developed very dynamically in recent years.
- In 2000, Austria still exported services worth EUR 1.3 bn to the USA, in 2020 it was EUR 1.5bn and in 2025 it was already EUR 3.7 bn.
- A strong increase can also be observed in imports of services from the USA. The services imports have risen by over 300% compared to 2000 and reached a value of EUR 4.3 bn in 2025.
- In contrast to goods trade, Austria is a net importer in services trade with the USA – Austria imports more services from the USA than it exports. This is mainly due to imports in the areas of financial services as well as legal and business services.

The US continues to be the most important target market for services exports outside Europe



Source: OeNB, Accenture Research

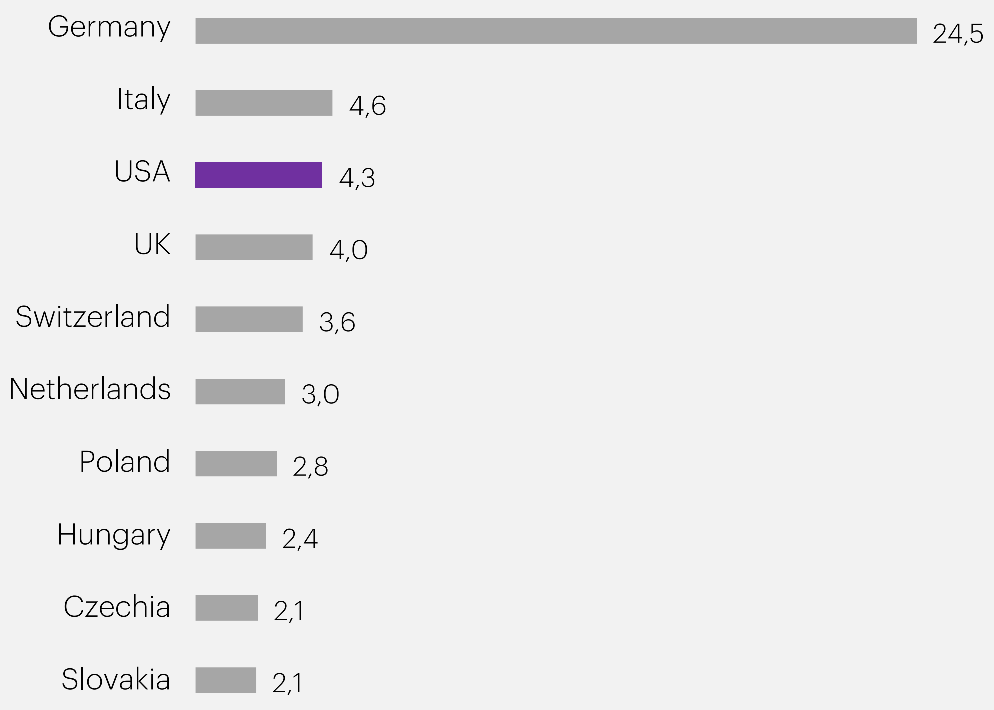
- In **2025** Austria **exported services** with a total value of **EUR 3.7 bn** to the US.
- The **USA** is, with a **share** of **4.0%** of total **services exports,** a significant **target market** for Austrian companies. This share has been **rising** in recent years – in 2023 the share was still just under 3.7%.
- Overall, the **US** are the **most important target market** for **Austrian services exports outside Europe**.

The US is the third most important trading partner of Austria for imports of services

- In 2025, **services** worth **EUR 4.3 bn** were **imported from the US to Austria** – this corresponds to **5.0% of all services imports**.
- This represents a slight but **continuous increase in the import share**. From 2022 to 2024 the values ranged between 4.8% and 4.9%.
- The US is therefore also in the area of **services** one of the **most important trading partners** of Austria.
- After Germany and Italy, Austria imports more services from the US than from any other country. This puts the **US** in **3rd place** of the **most important import countries** for **services**.

Top 10 import countries

Services imports to Austria 2025, in EUR bn



Source: OeNB, Accenture Research

Analysis at product level shows differing dynamics in the development of imports and exports

Goods imports from the US 2025

Top-5-Products	Value in EUR m	Change 2024–2025	Dynamic
Pharmaceutical products	2,690.8	+9.9%	++
Optical equipment	725.7	+5.6%	++
Motor vehicles & suppliers	669.1	-11.5%	––
Machinery & equipment	642.5	-1.4%	–
Chemical products	417.8	-7.2%	––

Goods exports to the US 2025

Top-5-Products	Value in EUR m	Change 2024–2025	Dynamic
Machinery & equipment	3,803.0	-18.0%	–––
Pharmaceutical products	2,182.5	-52.0%	–––
Electronic machines	1,324.9	+18.8%	+++
Motor vehicles & suppliers	1,296.6	-17.4%	–––
Optical equipment	650.0	+9.2%	++

Source: Statistik Austria, Accenture Research
Note: Preliminary data for 2025

Services imports from the US 2025

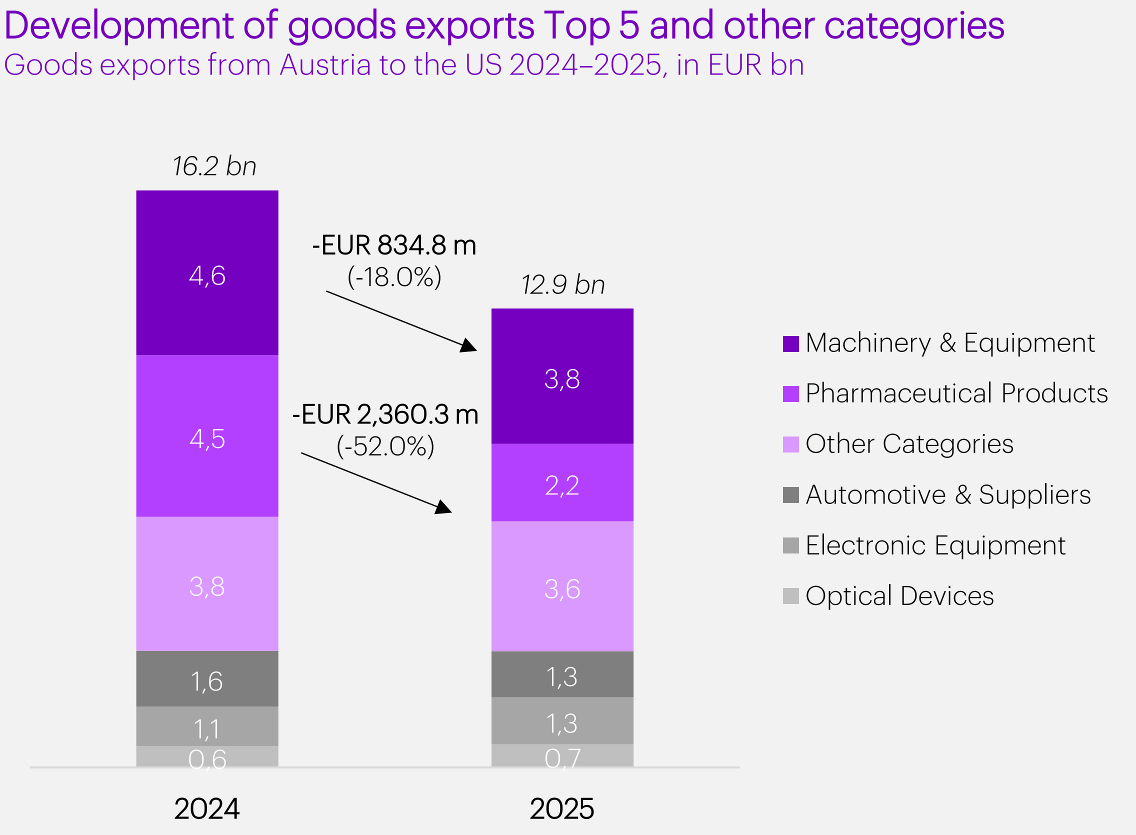
Top-5-Services	Value in EUR m	Change 2024–2025	Dynamic
R&D, legal and business services	1,743	+11.9%	++
ICT services	650	+12.7%	++
Transport	575	+9.5%	+
Fees for contract processing	415	+15.9%	++
Travel	405	-13.5%	––

Services exports to the US 2025

Top-5-Services	Value in EUR m	Change 2024–2025	Dynamic
R&D, legal and business services	1,408	-2.8%	–
Travel	839	+12.3%	++
ICT services	663	+15.1%	++
Transport	384	-1.3%	–
Patents, licenses and franchise	230	-22.6%	––

Source: OeNB, Accenture Research

Decline in exports of EUR 3.3 bn – mainly due to pharmaceuticals as well as machinery & equipment



Source: Statistik Austria, Accenture Research
Note: Preliminary data for 2025

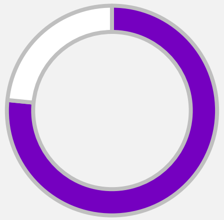
- In total, **exports from Austria to the United States** fell from EUR 16.2 bn in 2024 to EUR 12.9 bn in 2025.
- This corresponds to a **decline of EUR 3.3 bn** or a reduction of 20.4%.
- The decline is mainly due to lower exports in **pharmaceutical products (minus EUR 2,360.3 m or -52%)** as well as in **machinery & equipment (minus EUR 834.8 m or -18%)**.
- In 2024, there had been a preceding increase in exports of pharmaceutical products (plus EUR 2 bn).[1] Given the developments in 2025, the growth in 2024 is likely to have been an outlier.
- If the **one-off effects from the pharma sector in 2024** are deducted, there still remains a decline in exports of more than EUR 1 bn – this means that exports to the US fell significantly in 2025 in any case.

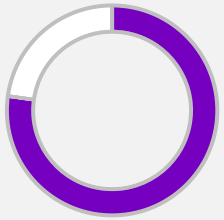
[1] Accenture (2025): Transatlantic Economic Relations, study in cooperation with AmCham

Three quarters of transatlantic trade involves key technologies important to both sides

Trade in high technology goods

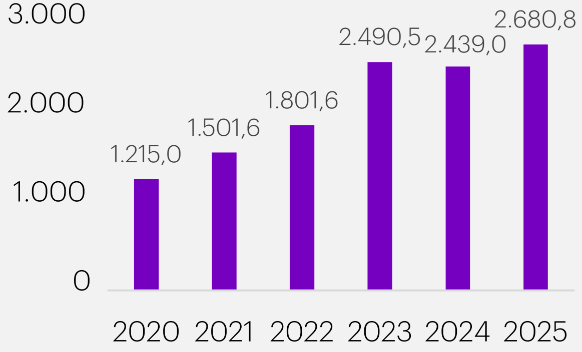
Austria's share of total goods trade with the US, 2025





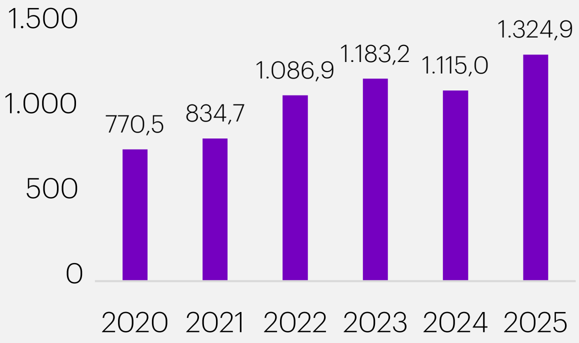
High technology goods with high momentum since 2020 (in EUR m)

high technology imports
Pharmaceutical products



+121%

high technology exports
Electronic equipment



+72%

- The **trade** with the US in **key technologies** continues to be of **central importance** in trade relations.
- In **2025**, the **share** of **high technology imports** from the US slightly **declined compared to the previous year** and now amounts to 76.6%. The **share** of **high technology exports** from Austria to the US amounts to 77.2%.
- In exports there was an overall reduction in 2025; **positive dynamics** were seen in **electronic equipment** (+18.8%).

High technology goods include:

- Chemical products
- Pharmaceutical products
- Aircraft & spacecraft
- Optical equipment
- Machinery & mechanical parts
- Electronic equipment
- Weapons
- Rail vehicles & tracks
- Motor vehicles & parts

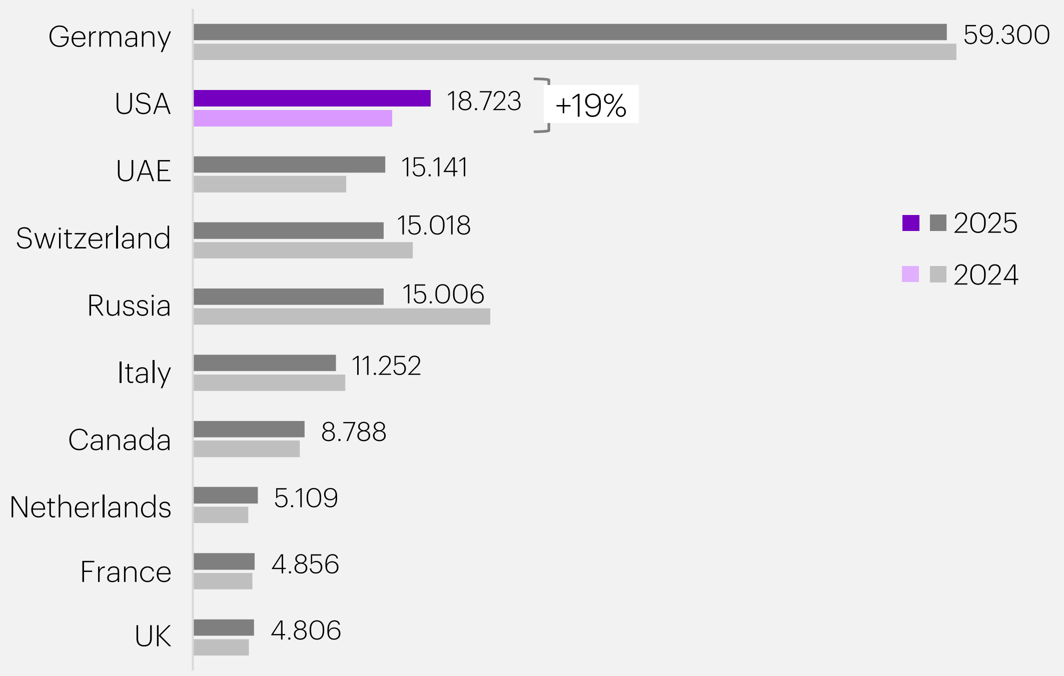
Source: Statistik Austria, Accenture Research
Note: Preliminary data for 2025

The US has become the second most important capital provider for Austria in 2025

- In 2025, the US became, behind Germany, the **second most important capital provider** for Austria.
- This continues the growth trend of recent years. Compared to the previous year, 2025 again saw a substantial **increase of 19%** to **EUR 18.7 bn of inward direct investments from the US** – in 2024 the figure was still EUR 15.7 bn.
- The **share** of the **US** of all FDIs (Foreign Direct Investments) in Austria amounts to **9.0%** and was increased compared to the previous year. In recent years, this share has risen continuously.

Top 10 capital providers

Stock of foreign direct investments, inward, from Austria's perspective, in EUR m, 2025

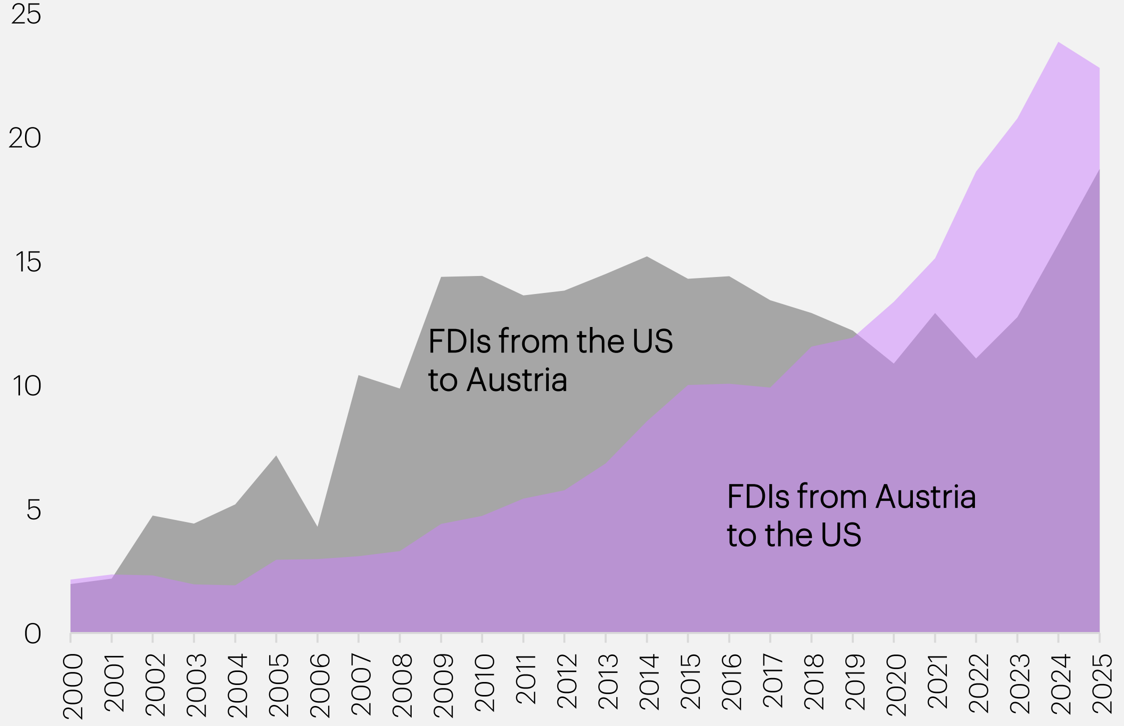


Source: OeNB, Accenture Research

US companies are investing in Austria – conversely, momentum eased somewhat in 2025

Capital stock from and to the US

Stock of foreign direct investments, outward and inward, in EUR bn



Source: OeNB, Accenture Research

- The stock of Austrian investments in the US has grown continuously for many years. While the stock of FDIs in the US was still EUR 4.7 bn in 2010, by 2025 it had already reached almost **EUR 22.8 bn**. In 2024, this reached a peak of EUR 23.9 bn.
- The US is therefore not only an important sales market for Austrian companies, but also a **significant investment market** – even if this momentum slowed in 2025 and the FDI stocks declined (FDI share to the US 2024: 8.5%; 2025: 8.3%).
- The importance of the US as a key target country is also reflected in the **establishment of production capacities** in the US.
- Conversely, the positive trend of US capital stock in Austria has continued since 2023.
- Also in 2025, the **FDI stocks from the US increased significantly** and stand at EUR 18.7 bn.

2 | US companies in Austria

Importance & economic contribution of the Top 50 US companies in Austria

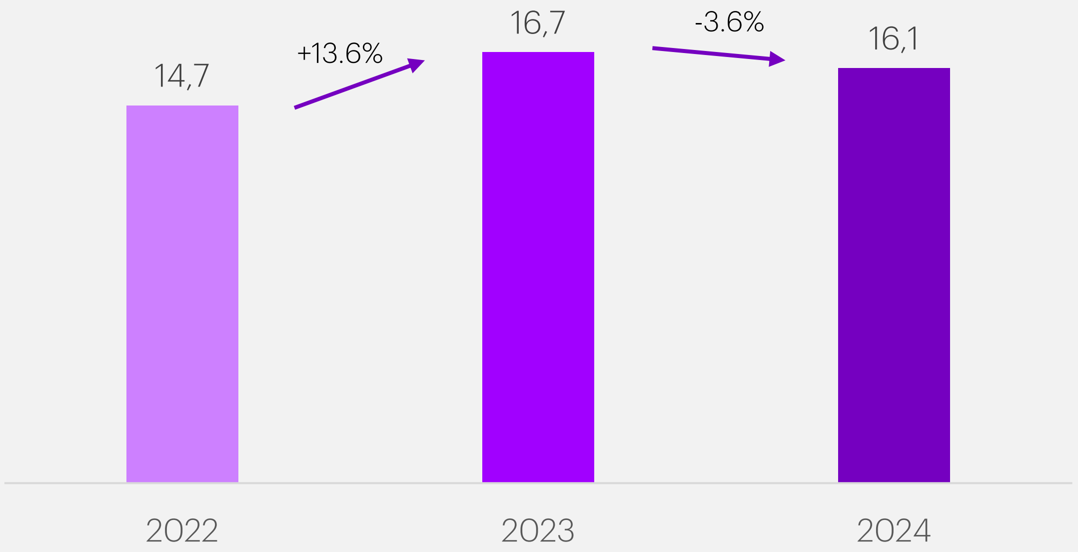
The Top 50 US companies in Austria generate revenues of EUR 16.1 bn in 2024

The Top 50 US companies in Austria

Revenues of US companies headquartered in Austria in EUR bn

Revenues: EUR 16.1 bn

Corresponds to 1.6% of all revenues in Austria



Source: Capital IQ, Statistik Austria, Accenture Research

- The Top 50 US companies generate **revenue** of approximately **EUR 16.1 bn** in 2024 through their activities in Austria; this corresponds to roughly **1.6% of all** revenues generated in Austria – the share has thus remained constant compared to the previous year.
- Compared to the previous year's study, which covers data from 2023, the revenues of the Top 50 US companies have **fallen by 3.6%.** This should be seen in the context of the challenging economic situation in Austria (economic downturn 2024).

The most significant US companies in Austria include, among others:

- Arrow Electronics
- Dentsply Sirona
- Eaton Corporation
- Ford Motor Company
- GE Healthcare
- IMS Nanofabrication
- Ingram Micro
- INNIO Jenbacher (Advent Int.)
- Janssen-Cilag Pharma
- JET Tankstellen (Phillips 66)
- Mars
- Microsoft
- Philip Morris
- TD SYNNEX
- Tesla
- voestalpine Tubulars (NOV)

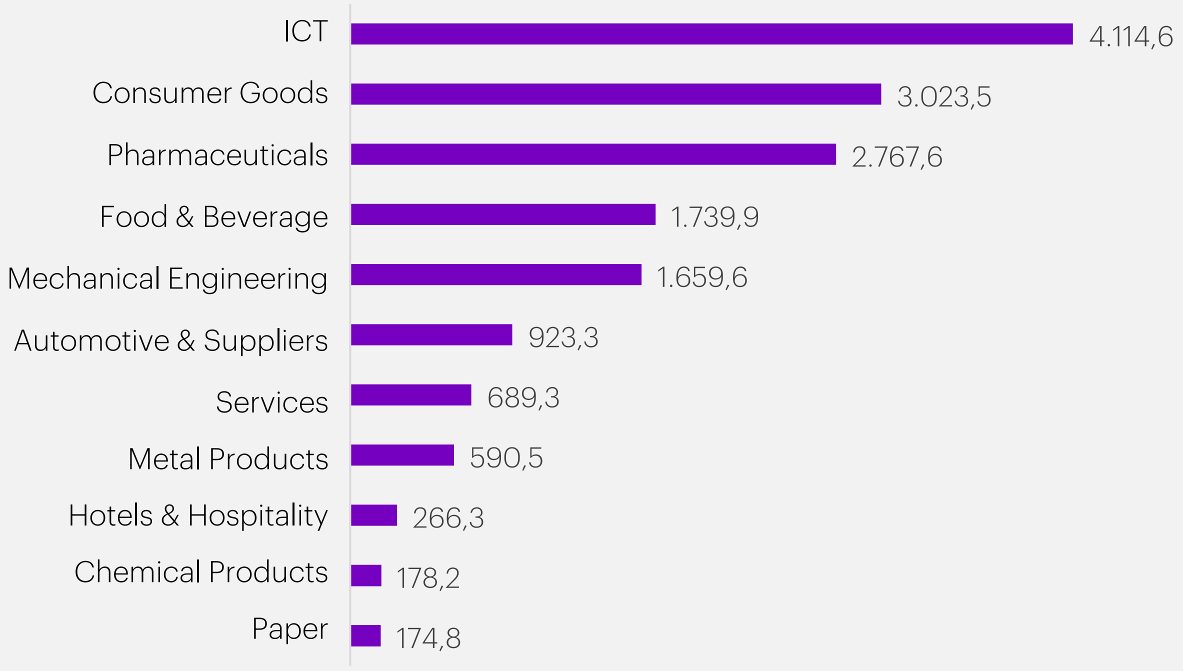
Note: Revenues of the US subsidiary with the legal entity headquartered in Austria – export data of the parent company are not included here.

US companies in the ICT and consumer goods sectors play a central role in Austria

- A look at the distribution of revenues of the Top 50 US companies in Austria by industry shows that the **greatest importance** continues to lie with the **ICT** and **consumer goods industries**, which account for revenues of **EUR 4.1bn** and **EUR 3bn**, respectively. The largest players here are Microsoft and Philip Morris.
- US companies in **Pharmaceuticals** generate **EUR 2.7bn**, the **Food industry more than EUR 1.7bn, and Mechanical engineering** around **EUR 1.6bn** in 2024. Pharmaceuticals grows by **+16.5%** compared to the previous year, thus overtaking Mechanical engineering. The largest companies in these industries are Dentsply Sirona, INNIO Jenbacher and Mars.
- Compared to the previous year, **revenue increases were observed for companies in Pharmaceuticals (+16.5%), Chemical products (+4.0%) and Food (+1.3%)**. This reflects a growing engagement of US companies in research- and consumer-related industries at the Austrian location.

Industry distribution of the Top 50 US companies

Revenues of the Top 50 in Austria by industry, in EUR m, 2024



Source: Capital IQ, Accenture Research

Note: Revenues of the US subsidiary with the legal entity's headquarters in Austria – export data of the parent company are not included.

The economic contribution of companies or a sector includes direct and indirect effects

Upstream / intermediate inputs

- Energy
- Real estate
- Insurance
- Accounting
- Cleaning
- and many more

Indirect effects
through procurement from suppliers

+

Activities within the companies or the sector

- Revenues
- Value added
- Employees

Direct economic effects
from business activity

+

Downstream / output uses

- Industry
- Public administration
- Logistics
- Research
- Trade/end consumption
- and many more

Indirect effects
through sales to other sectors

∑ **Total effect** = economic contribution:

- GDP
- Employment
- Taxes

The Top 50 US companies in Austria contribute 2.3% to Austria's GDP

Economic contribution of the Top 50 US companies

Total effects, 2024

direct effects		indirect effects[1]		Total effects
EUR 16.1bn Revenues ≙		*Effects through upstream and downstream supplier firms along the entire value chain*		
EUR 5.4 bn Value added	+	EUR 4.7 bn Value added	=	EUR 10.1 bn Value added
76,000 Employees		66,000 Employees		142,000 Employees

Source: Accenture Research

2.3% GDP share

The total value-added contribution (direct and indirect effects) of the Top 50 US companies in Austria amounts to EUR 10.1bn, which corresponds to EUR 11.3 bn when converted to GDP.

142,000 Employees

In total, 142,000 employees can be attributed to the Top 50 US companies in Austria (76,000 directly, another 66,000 via supplier firms). This corresponds to 3.7% of the entire workforce in Austria.

EUR 5.0 bn Taxes & levies

About EUR 5.0bn in taxes and levies are attributable to the Top 50 US companies in Austria. This results from wage-related taxes and levies (direct and indirectly via supplier firms) as well as further tax contributions.

[1] Methodology: To calculate the indirect value-added effects, the industry-specific value-added multipliers from the input-output table of Statistik Austria were used (proportionally).

US IT companies generate EUR 3.7bn in value added in Austria

Economic contribution of the ICT sector[1]

Total effects, 2024

direct effects		indirect effects[2]		Total effects
EUR 4.1bn Revenues ≙		Effects through upstream and downstream supplier firms along the entire value chain		
EUR 1.9 bn Value added	+	EUR 1.8 bn Value added	=	EUR 3.7 bn Value added
19,000 Employees		18,000 Employees		37,000 Employees

Source: Accenture Research

EUR 3.7 bn Contribution to value added

The total value-added contribution (direct and indirect effects) of the Top 50 US companies in Austria in the ICT sector amounted to around EUR 3.7 bn in 2024 and has thus declined slightly compared to the previous year.

37,000 Employees

In total, 37,000 employees in the entire economy can be attributed to the activities of the Top 50 US companies in Austria in the ICT sector (directly and via supplier firms).

36% Contribution of ICT companies

The ICT companies contribute about 36% to the total economic effects of the Top 50 US companies in Austria. The share of the ICT contribution has remained unchanged since the last study.

[1] From the Top 50, the following companies: Arrow ECS, Dell, EMC Computer Systems Austria, Hewlett-Packard Austria, IBM Austria, IMS Nanofabrication, Ingram Micro, LAM Research, Microsoft Austria, TD SYNNEX Austria.
[2] Methodology: To calculate the indirect value-added effects, the industry-specific value-added multipliers from the input-output table of Statistik Austria were used (proportionally).

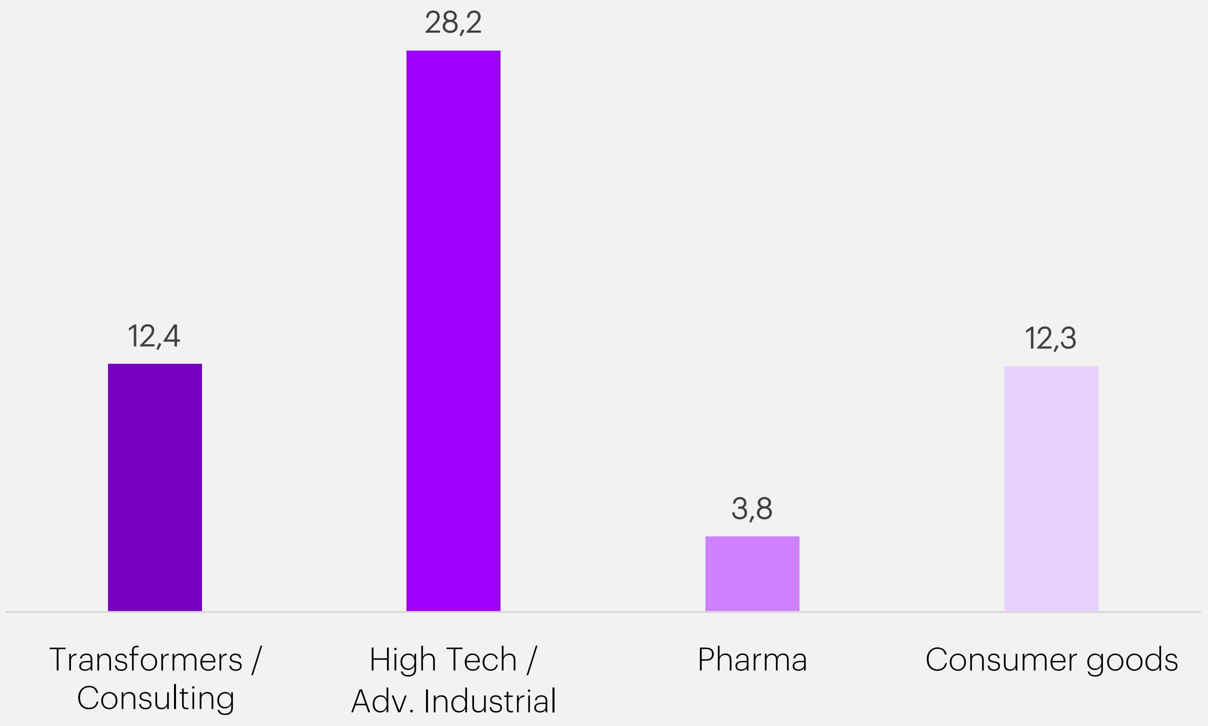
3 | Transformation contribution of US companies

Contribution of US companies to transformation and structural change in Austria

Digital transformation: Technology industry shows the highest share of US companies

Market shares of US subsidiaries

Revenue shares of US subsidiaries in ÖNACE industries
Share of industry revenue in Austria in %



- The chart shows for selected industries in Austria which share of the total industry revenue is generated by US subsidiaries. The **high technology industry** (Advanced Industrial) shows by far the **highest revenue share of US subsidiaries at 28.2%**.
- In the Transformers / Consulting (12.4%) and Consumer goods (12.3%) areas, the share is at a comparable, medium level.
- The Pharma industry in Austria records the lowest revenue share of US companies at 3.8%.
- **US subsidiaries** are thus present across all industries; however, their importance **clearly concentrates on the technology- and industry-related area**.
- This underlines the **central role of US companies for the digital and innovative structural change in Austria**: Precisely these industries act as important drivers of technology, investments and know-how transfer and are thus decisive for the future competitiveness of the location.

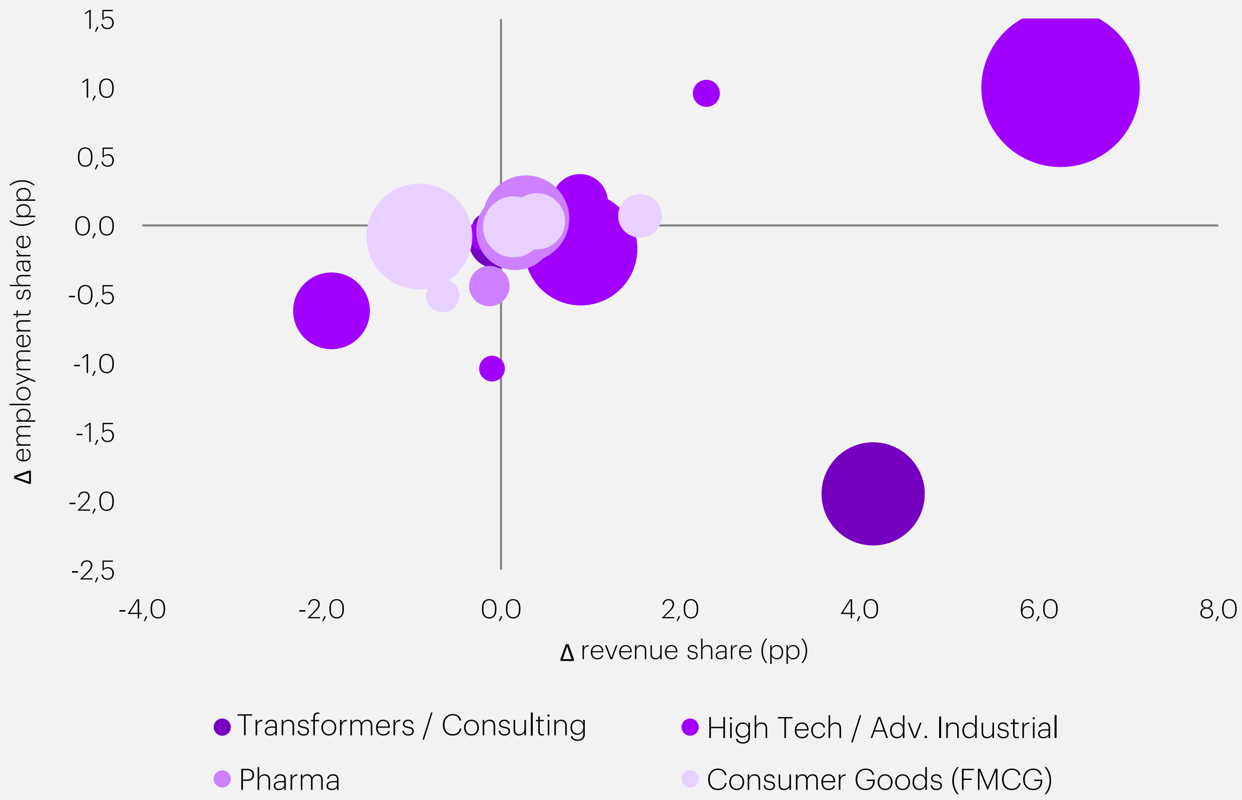
Source: Economica / Wirtschaftscompass, STATcube
Note: High Tech/ Adv. Industrial - GE Healthcare and Amazon Web Services excluded

Structural change significantly driven by US technology firms – growth dynamics in revenue performance

- The bubble chart shows the **change in market share of US subsidiaries**, on the one hand by change in revenue share (x-axis) and on the other by employment share (y-axis) in percentage points for 2018/19 vs. 2023/24. The size of the bubble reflects the size of the respective company.
- The **high technology industry** as well as **Transformers / Consulting** are predominantly in the right area (positive revenue change) – with revenue shares that have partly risen significantly, up to +6 pp.
- Companies from **Pharma** and **Consumer goods** cluster, in contrast, near zero or in the left area and thus show lower market share dynamics.
- The **growth of US subsidiaries in Austria** is clearly **driven by the technology- and industry-related sectors**. The structural change of the US presence in Austria is thus clearly technology-driven: US companies are increasingly shifting their weight to innovation-relevant fields.

Dynamics of US companies in Austria

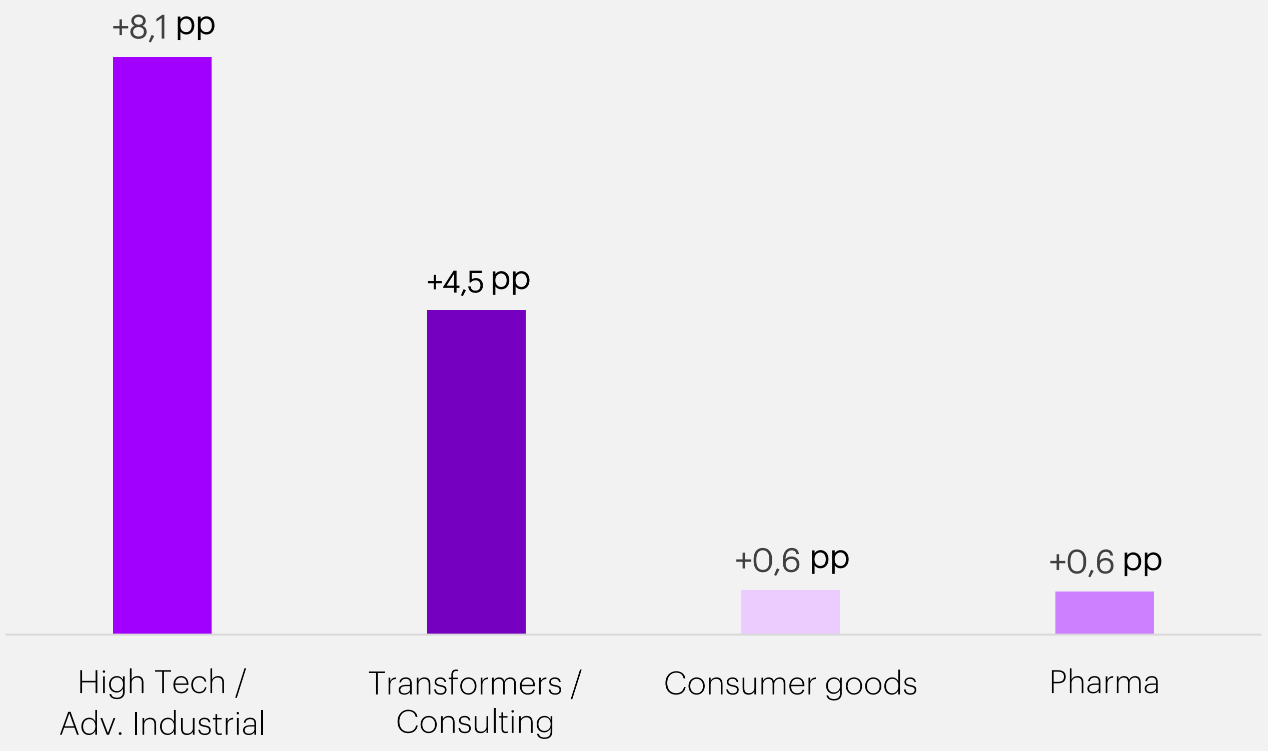
Change in market share of Austrian US subsidiaries, 2018/19 vs. 2023/24



Growth drivers US companies: Presence rises most strongly in technology- and industry-related sectors

Dynamics of US share in Austrian industries

Change in revenue share of US subsidiaries in ÖNACE industries, 2018/19 vs. 2023/24, in pp

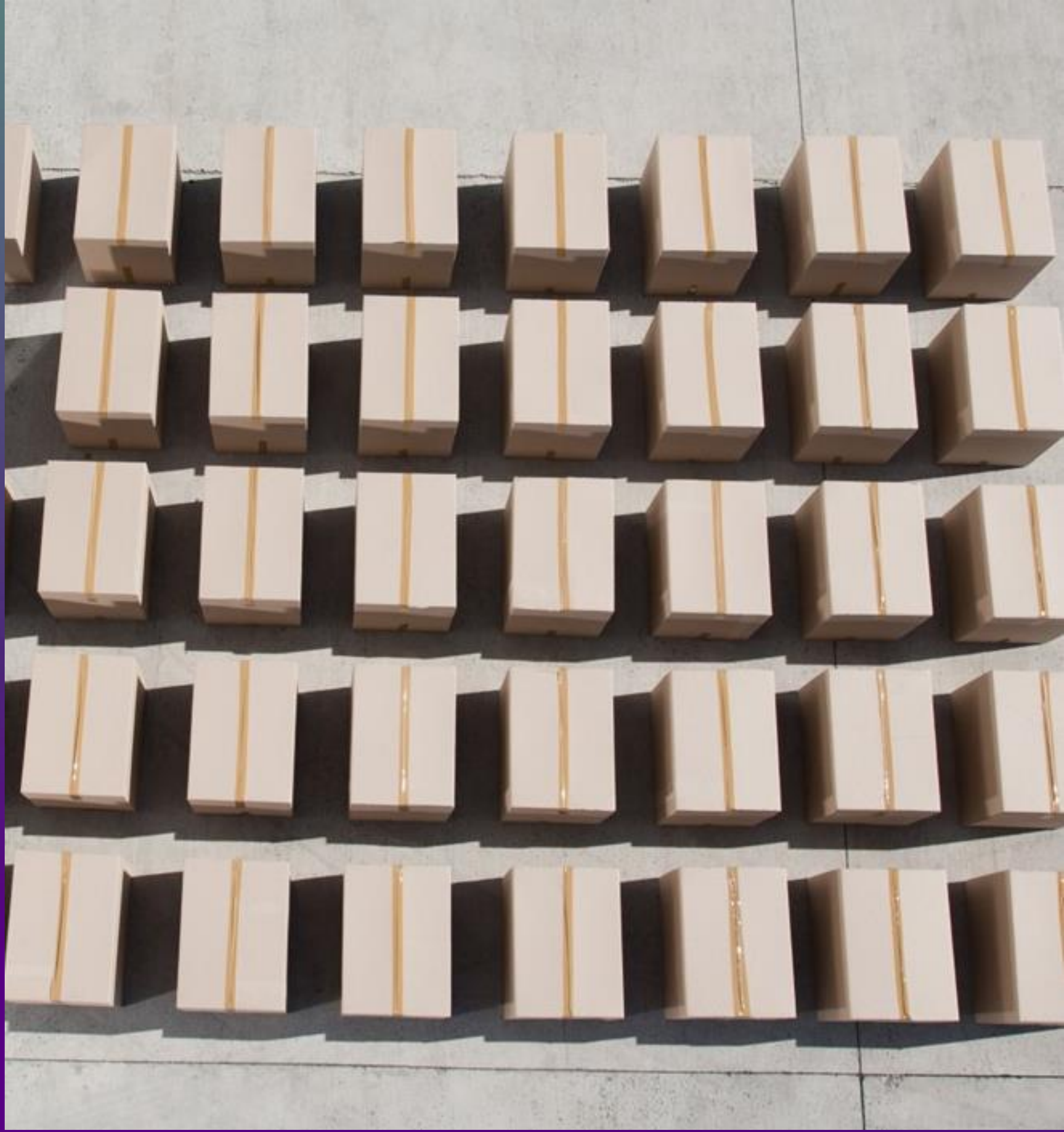


- The chart shows the change in revenue share of US subsidiaries in Austria in the four most important industries between 2018/19 and 2023/24 (in percentage points).
- By far the **largest growth** is recorded by US companies in the **high technology sector with growth of 8.1 pp**, followed by Transformers and Consulting with 4.5 pp.
- Companies in Consumer goods and Pharma barely gain ground with 0.6 pp each.
- The **growth of US companies in Austria is thus clearly concentrated on the technology- and industry-related sectors**, which are expanding their market shares.
- This underscores that the increasing **US presence** is affecting the **innovation- and future-relevant core of the Austrian economy ever more strongly** – and thus plays a central role for the technology-driven structural change of the location.

Source: Economica / Wirtschaftscompass, STATcube
Note: GE Healthcare Austria and Amazon Web Services excluded. Sum of company shares per category in the respective ÖNACE industry (STATcube LSE, 2018/2019 vs. 2023/2024). Methodological break FRIBS 2021.

4 | Austrian companies in the USA

Economic importance of the Top 50 Austrian companies in the USA



The USA is an important target country for internationally active Austrian companies

Austrian companies in the USA

950

subsidiaries

of Austrian parent companies are active in the USA

60,000

Jobs

are secured by Austrian companies through their subsidiaries in the USA

4.5%

of foreign subsidiaries

of Austrian companies are attributable to the USA – the fourth most important target country

Attractive investment location

The **Southeast** of the USA, in particular Georgia, South Carolina and North Carolina, is an important **investment location** for Austrian companies. More than **110 branches of Austrian companies** are located in this region. Attractive location factors include highly **qualified specialists**, **low labor** and **operating costs**, **low tax burden** as well as the logistically advantageous **location** with several **international freight ports**.

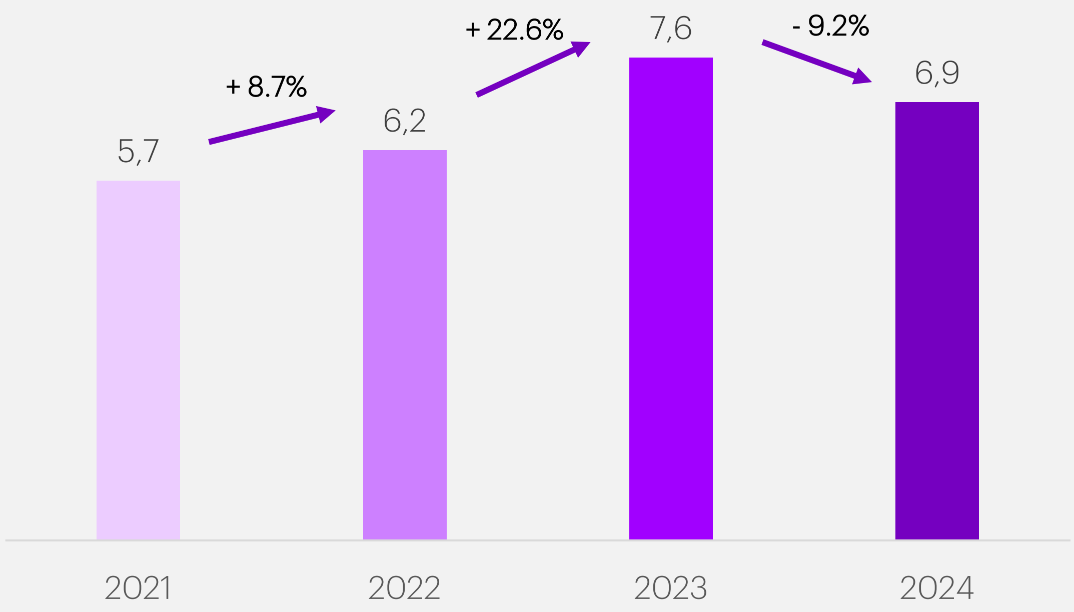
Source: WKO, Statistik Austria, Accenture Research

The Top 50 Austrian companies in the USA generate around 6.9 bn euros in revenues

The Top 50 Austrian companies in the USA

Revenues of Austrian companies headquartered in the USA, in bn EUR

Revenues: 6.9 bn euros



Source: Capital IQ, Accenture Research

- The Top 50 Austrian companies headquartered in the USA generated in 2024 a **revenue** of around **6.9 bn euros** through their business activities in the USA.
- Compared with the 2023 data, from 2023 to 2024 there was a **revenue decline** of approx. **9.2%**. This corresponds to almost 0.7 bn euros.

The most significant Austrian companies headquartered in the USA include, among others:

- ALPLA
- Agrana
- Andritz
- Benteler International
- Knapp
- Kronospan
- Plansee Holding
- Red Bull
- RHI Magnesita
- Rosenbauer
- Stumpf
- SWARCO
- voestalpine
- Wienerberger

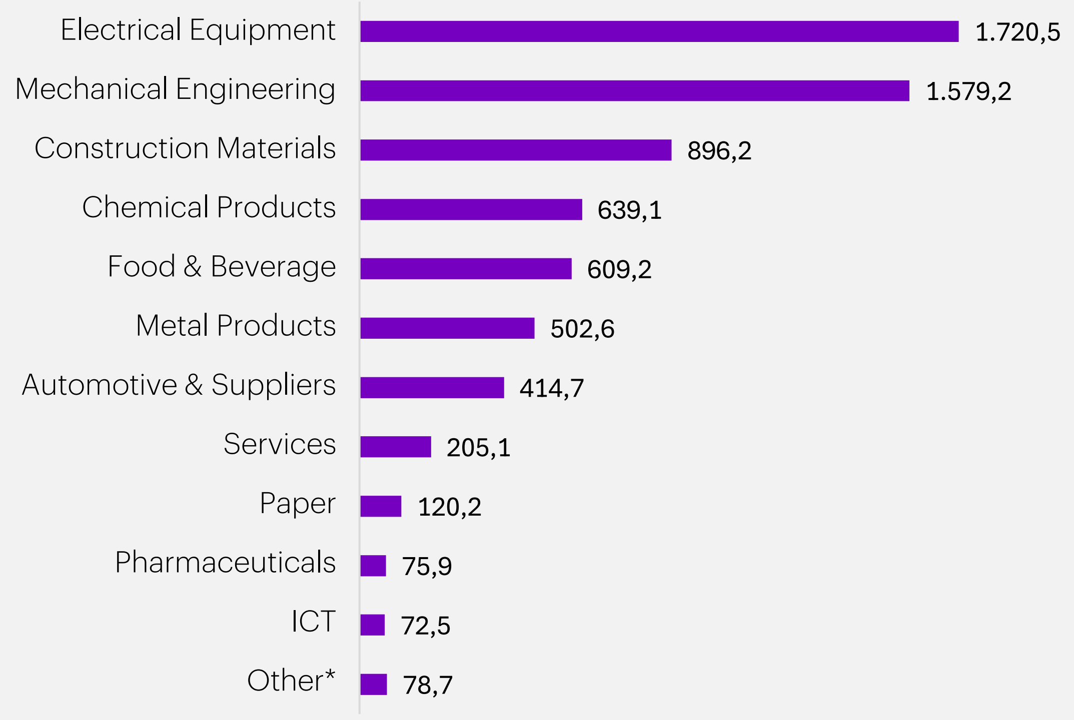
Note: Revenues of the Austrian subsidiary with the legal entity headquartered in the USA – export data of the parent company are not included here.

Most Austrian companies operate in the US in mechanical engineering and electrical equipment

- The **Mechanical engineering** and **Electrical equipment** industry has by far the **greatest significance** among the Top 50 Austrian companies in the USA, with a revenue of nearly **3.3 bn euros** in 2024. Andritz, Stumpf and Osram are among the largest companies with US presence here.
- With a revenue of nearly **900 m euros** the **construction materials industry** is also strongly represented in the US market, here Wienerberger and Kronospan are among the largest players.
- Austrian companies are equally important in the US **chemical industry.** In 2024, Austrian US subsidiaries were able to generate a revenue of nearly **640 m euros** . Notable companies here are RHI Magnesita and ALPLA.

Industry distribution of the Top 50 Austrian companies

Revenues of the Top 50 in the USA by industry, in m EUR, 2024



*Other industries: Weapons, gastronomy and accommodation
Source: Capital IQ, Accenture Research

Note: Revenues of the Austrian subsidiary with the legal entity headquartered in the USA – export data of the parent company are not included here.

voestalpine has been expanding production capacities at the Jeffersonville location since 2024

The Austrian steel and technology group headquartered in Linz specializes in advanced profiles, tubes, precision strip steel and ready-to-install components for automotive, commercial vehicles, construction, aerospace, energy and mechanical engineering. More than 500 group companies belong globally to the corporate group.

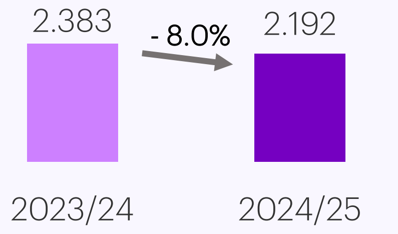
- Group revenue 2024/25: approx. 15.7 bn EUR (global)
- Locations: ~500 companies in 50+ countries
- Employees: 49,298 global
- USA: 2,575 employees (5.2% worldwide)

USA Location

- voestalpine is represented in the USA with different divisions at 17 different locations.
- In August 2024, the expansion of the location in Jeffersonville, Indiana was announced. The background is new long-term contracts for the North American market with two global truck manufacturers.
- The expansion is set to double the production capacity at the location and create 110 new jobs; planned are around 15,000 m² of additional space. Production start is scheduled for 2026.
- Investment volume: 70 m euros or around 78 m US dollars.

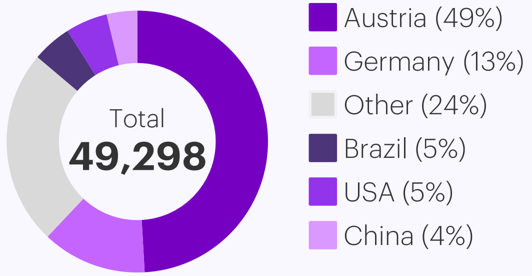
Revenue growth USMCA

in m EUR (USMCA Region = USA, Mexico and Canada)



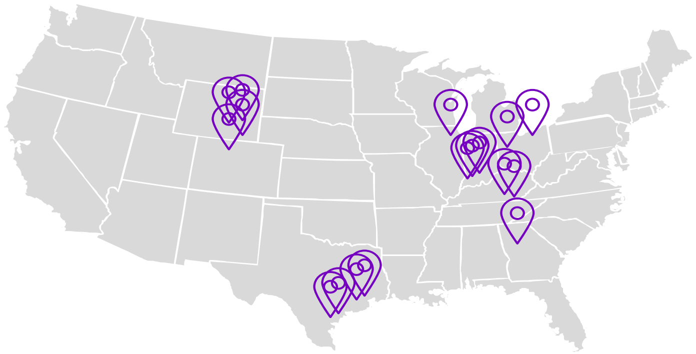
14% of global total revenue

Employees by country 2024/25



Company locations and offices in the USA

voestalpine



AGRANA expanded the food service area in Centerville, Tennessee in 2024/25

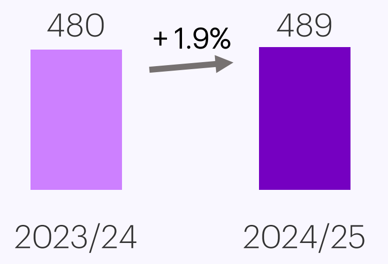
The Austrian food and agricultural raw materials group operates in the Sugar, Fruit preparations and Starch segments. AGRANA is the world market leader in fruit preparations, leading producer of apple and berry juice concentrates and important European manufacturer of specialty starches and bioethanol.

- Group revenue 2024/25: 3.5 bn EUR (global)
- Locations: 51 production sites in 24 countries
- Employees: 8,980 global (approx. 28% in AT)
- USA: 424 employees at 6 locations

USA Location

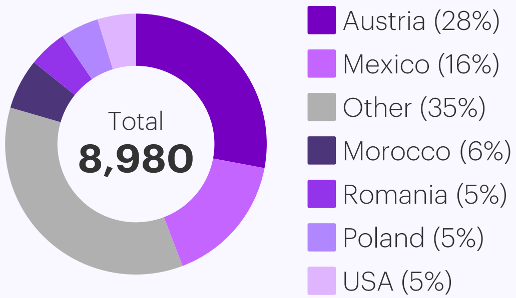
- AGRANA operates 4 production sites in the USA as well as its own innovation center and a sales office. Especially in fruit preparations, the USA represents an important growth market.
- In 2024/25, a total of 52.0 m euros was invested at the 38 Fruit production sites worldwide. These were mainly used for capacity expansions, the modernization of packaging facilities as well as safety upgrades.
- As part of this, an expansion of the food service area took place at the location in Centerville, Tennessee in the USA.

Revenue growth North America
in m EUR (North America)

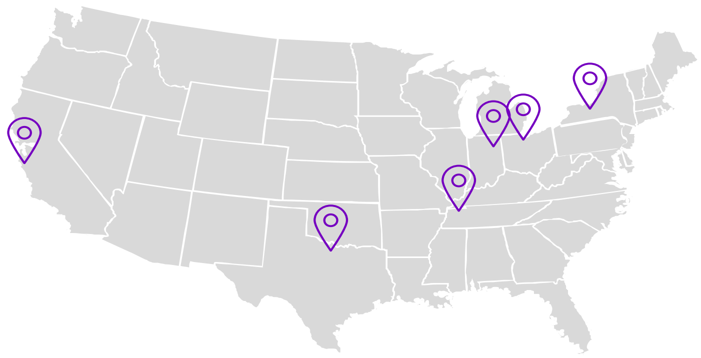


~14% of global total revenue

Employees by country 2024/25



Company locations and offices in the USA
AGRANA



Source: AGRANA, Accenture Research

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