2015 Texas

The Logistical Heart of North America

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THE STATE OF TEXAS GOVERNOR

TEXAS WIDE OPEN FOR BUSINESS®

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Deep Water Sea Ports

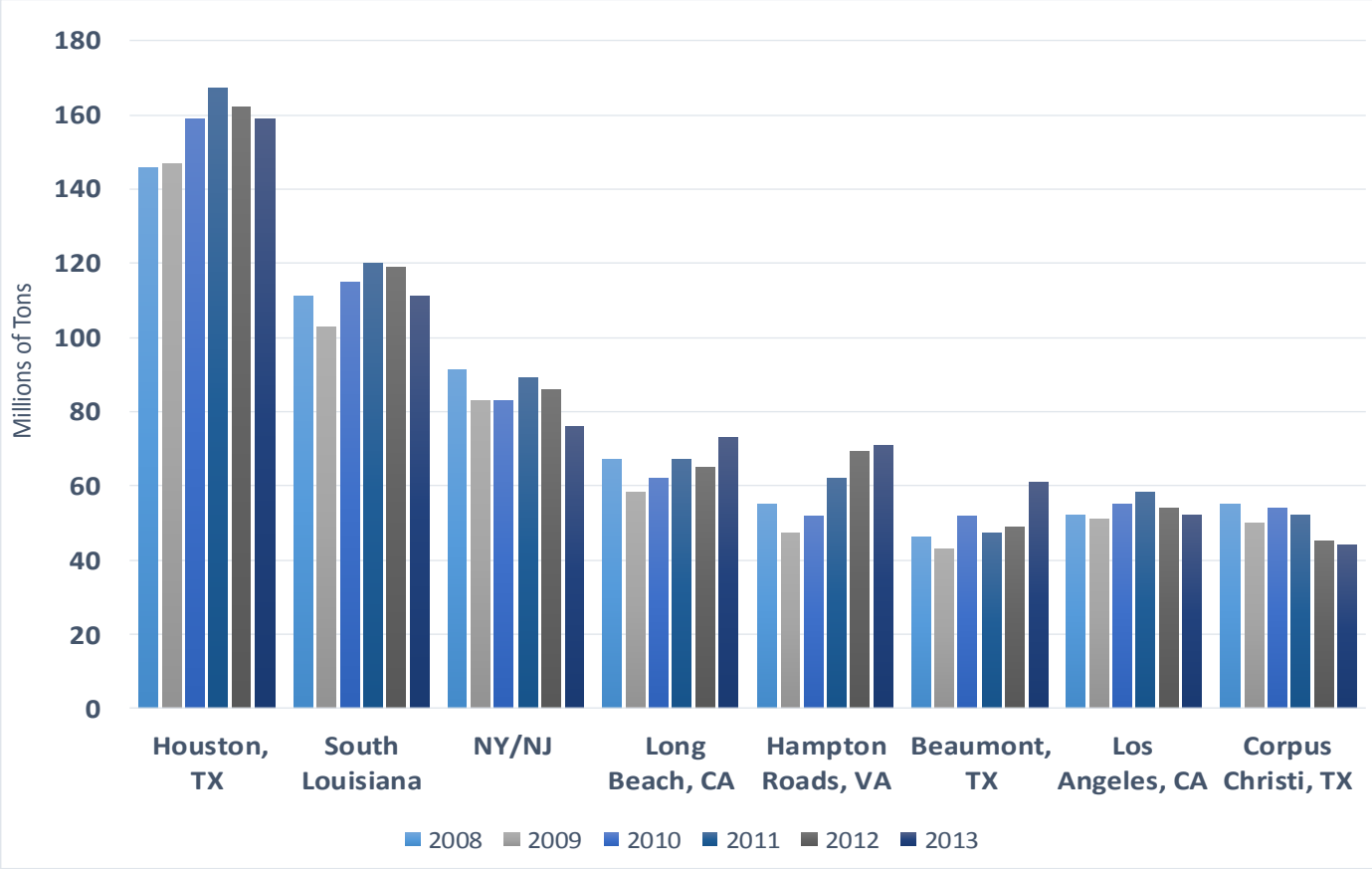
- The **Port of Houston** is the largest gulf coast container port, handling 67 percent of U.S. Gulf coast container traffic in 2014.
- The **Ports of Beaumont** and **Corpus Christi** rank in the top 10 among all U.S. ports for total cargo volume.
- Texas has more than **1,000 miles of channel** maintained by the U.S. Army Corps of Engineers.
- The **Port of Brownsville** is planning to increase the 17-mile-long channel depth to 52 feet from it's current depth of 42 feet. This will allow the port to accommodate the new Post-Panamax vessels expected to utilize this international gateway in the coming years.

Sources: Texas Department of Transportation, 2014 Texas Port Report

Texas Seaports Dominate Foreign Trade

In 2013, the Port of Houston ranked No. 1 in foreign waterborne tonnage, U.S. imports, and U.S. exports. The Ports of Beaumont and Corpus Christi also ranked in the top 10.

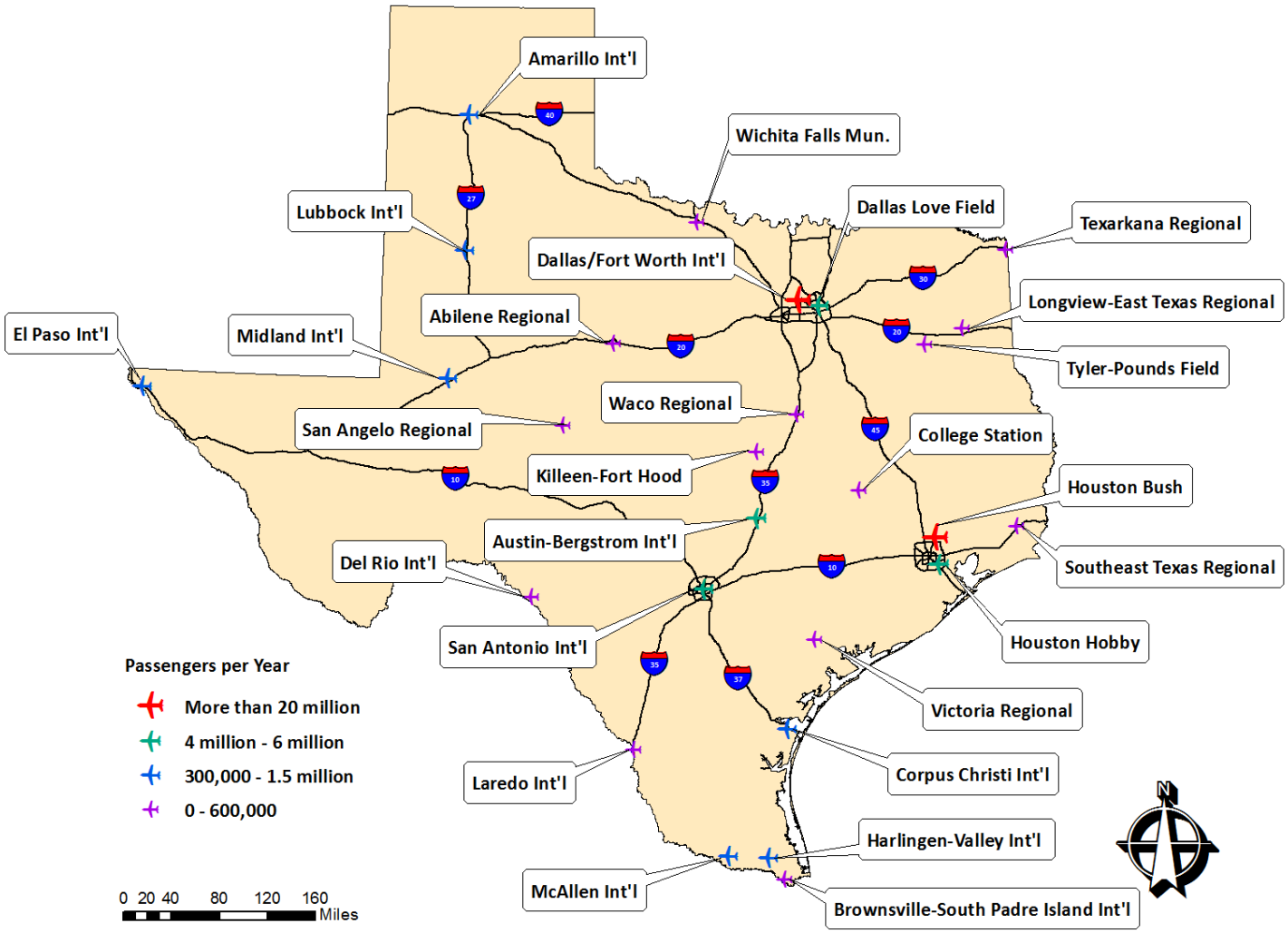
Total Foreign Trade at Major U.S. Ports



Source: American Association of Port Authorities

Commercial Airports

- **27 Texas communities** are served by airports offering scheduled service on commercial airlines.
- The Dallas-Fort Worth region is home to the headquarters of two major international air carriers, **American Airlines** and **Southwest Airlines**. A third, **United Airlines**, operates a major hub in Houston.
- Texas is home to **six of the top 50 busiest airports** in the country, by annual passengers boarded, including:
  - #4 Dallas/Fort Worth International (DFW)
  - #11 Houston George Bush Intercontinental (IAH)
  - #32 Houston William P. Hobby (HOU)
  - #34 Austin Bergstrom International (AUS)
  - #41 Dallas Love Field (DAL)
  - #44 San Antonio International (SAT)



Source: FAA, 2014 Passenger Boarding Data, airport websites

Major Texas Airports

U.S. rank

#4

Dallas/Fort Worth International

Passengers Boarded (2014): 30.8 million

U.S. Rank: No. 4 busiest (2014 enplanements)

World Rank: No. 9 busiest (2014 total passenger traffic):

Hub Carrier: American Airlines Group (85.3 percent market share combined)

Notable: Accessible to every major city in the U.S. within four hours

Cargo Volume Annually: 600,000 tons

New Nonstop International Routes:

- Dallas - Abu Dhabi (DFW-AUH)
- Dallas - Beijing (DFW-PEK)
- Dallas - Hong Kong (DFW-HKG)

#11

George Bush Intercontinental Houston (IAH)

Passengers Boarded (2014): 19.8 million

U.S. Rank: No. 11 busiest (2014 enplanements)

World Rank (2014 total passenger traffic): No. 25 busiest

Hub Carrier: United (the airline's largest hub)

Cargo Volume Annually: 430,000 tons

New Nonstop International Routes

- Houston - Stavanger (IAH-SVG)
- Houston - Seoul (IAH-ICN)
- Houston - Santiago (IAH-SCL)

Notable: Offers more direct flights to Mexico than any other U.S. airport

#32

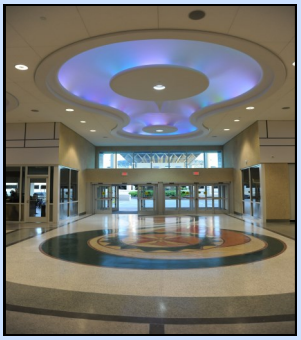
William P. Hobby Houston (HOU)

Passengers Boarded (2014): 5.8 million

U.S. Rank: No. 32 busiest (2014 enplanements)

New International Terminal

Southwest Airlines is in the process of building a new 280,000 sq. ft. international terminal. The $156 million project is set to be completed later this year and will allow the airline to offer flights to Latin America by the end of 2015.



#34

Austin-Bergstrom Int'l (AUS)

Passengers Boarded (2014): 5.2 million

U.S. Rank: No. 34 busiest (2014 enplanements)

New Terminal Planned

The City of Austin is planning a $240 million expansion of the terminal that could be finished by Fall 2017.

Austin Bergstrom launched its first trans-Atlantic flight in March of 2014 on flights to London Heathrow.

#41

Dallas Love Field (DAL)

Passengers Boarded (2014): 4.5 million

U.S. Rank: No. 41 busiest (2014 enplanements)

The Future Is Here

The Love Field Modernization Program, a $519 million project, began in 2009 and is nearly complete. The redesigned terminal and baggage claim area are now fully operational and an additional 8 new gates will be completed soon.

#44

San Antonio International (SAT)

Passengers Boarded (2014): 4.0 million

U.S. Rank: No. 44 busiest (2014 enplanements)

Preparing For The Future

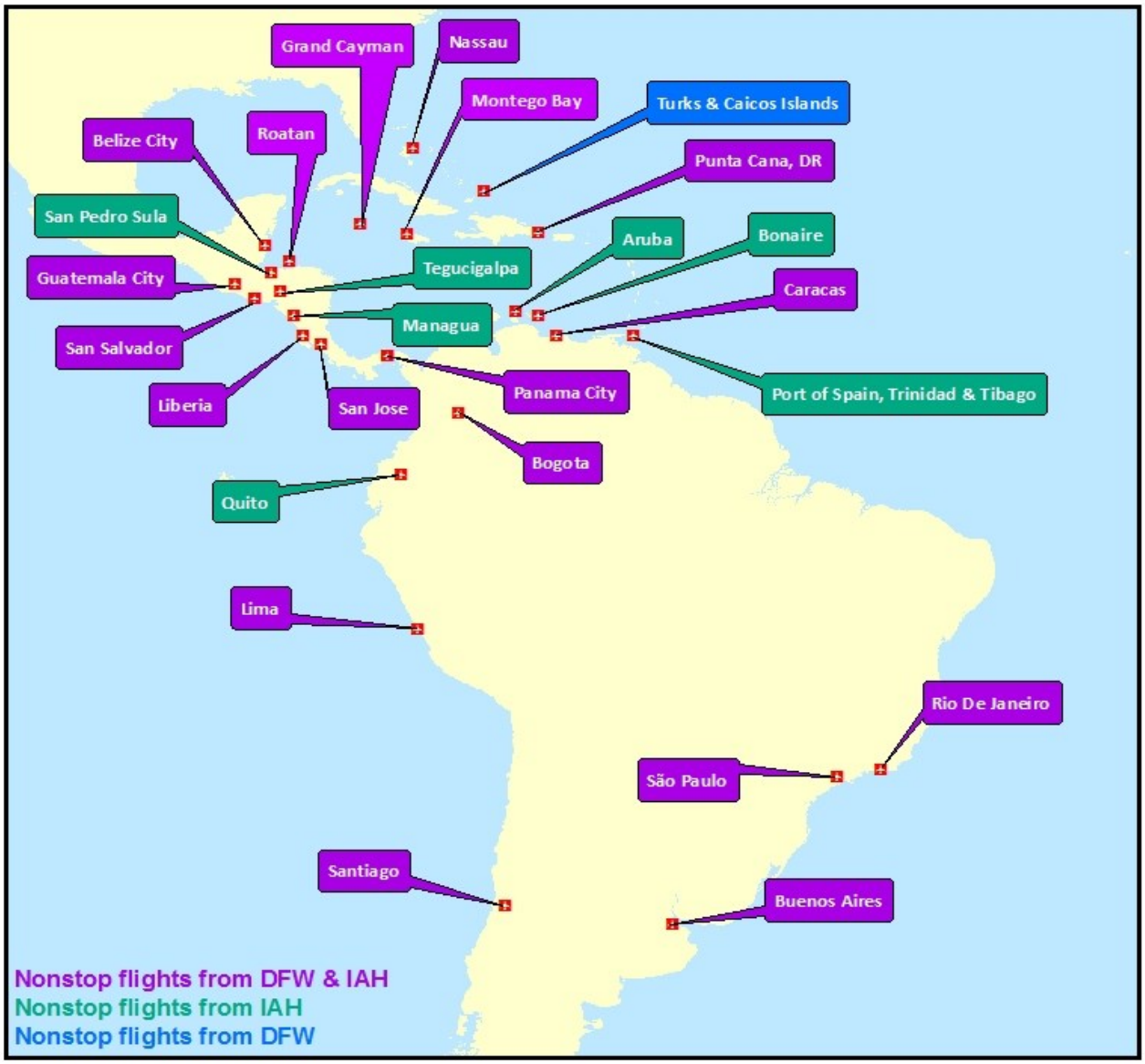
The airport's long-term master plan, Vision 2050, was approved by the city council in 2011. The plan allocates $815 million for capital projects over the next 20 years.

SAN ANTONIO AIRPORT SYSTEM

2015 Texas Nonstop Flight Destinations in Mexico

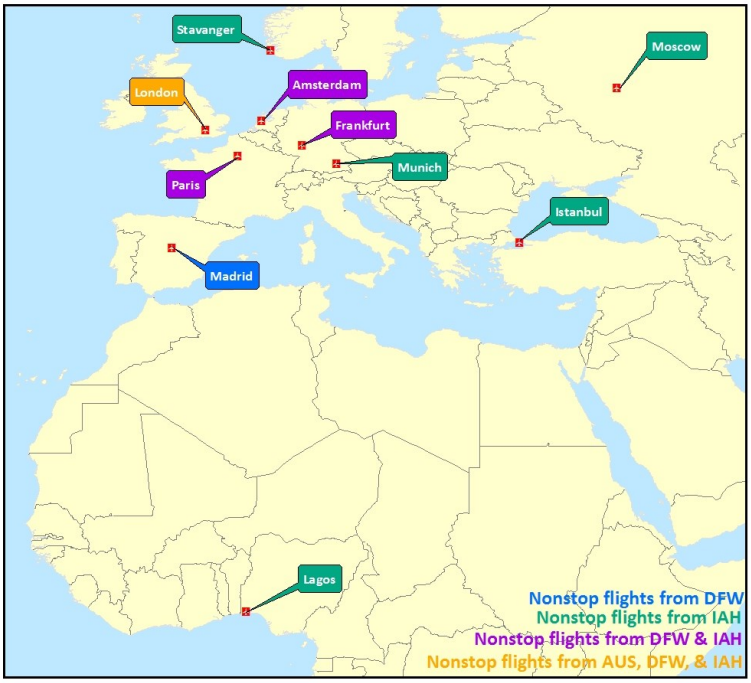
Source: 2015 International scheduled flights to all Texas airports

2015 Texas Nonstop Flight Destinations in the Caribbean and South America

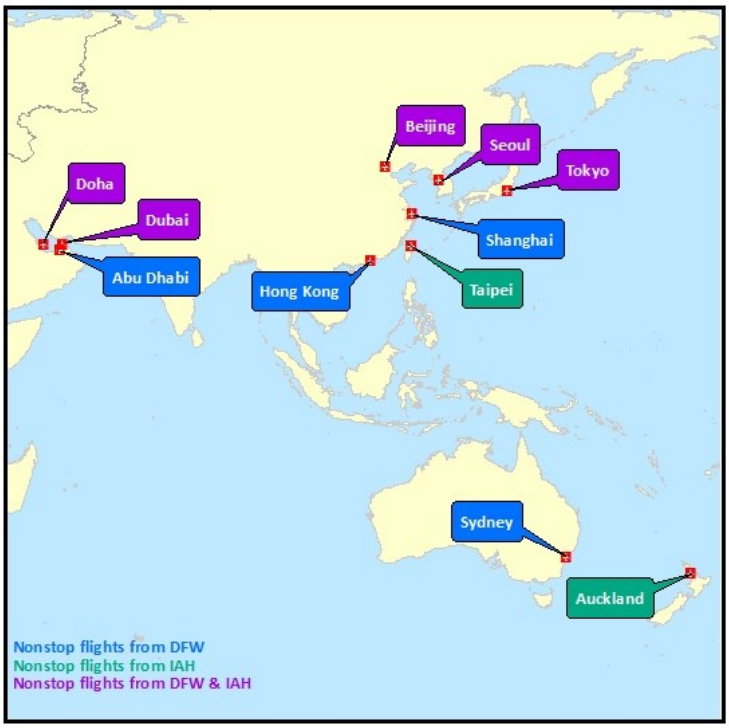


Source: 2015 International scheduled flights to all Texas airports

2015 Texas Nonstop Flight Destinations in Europe, Africa, Asia, and the Pacific



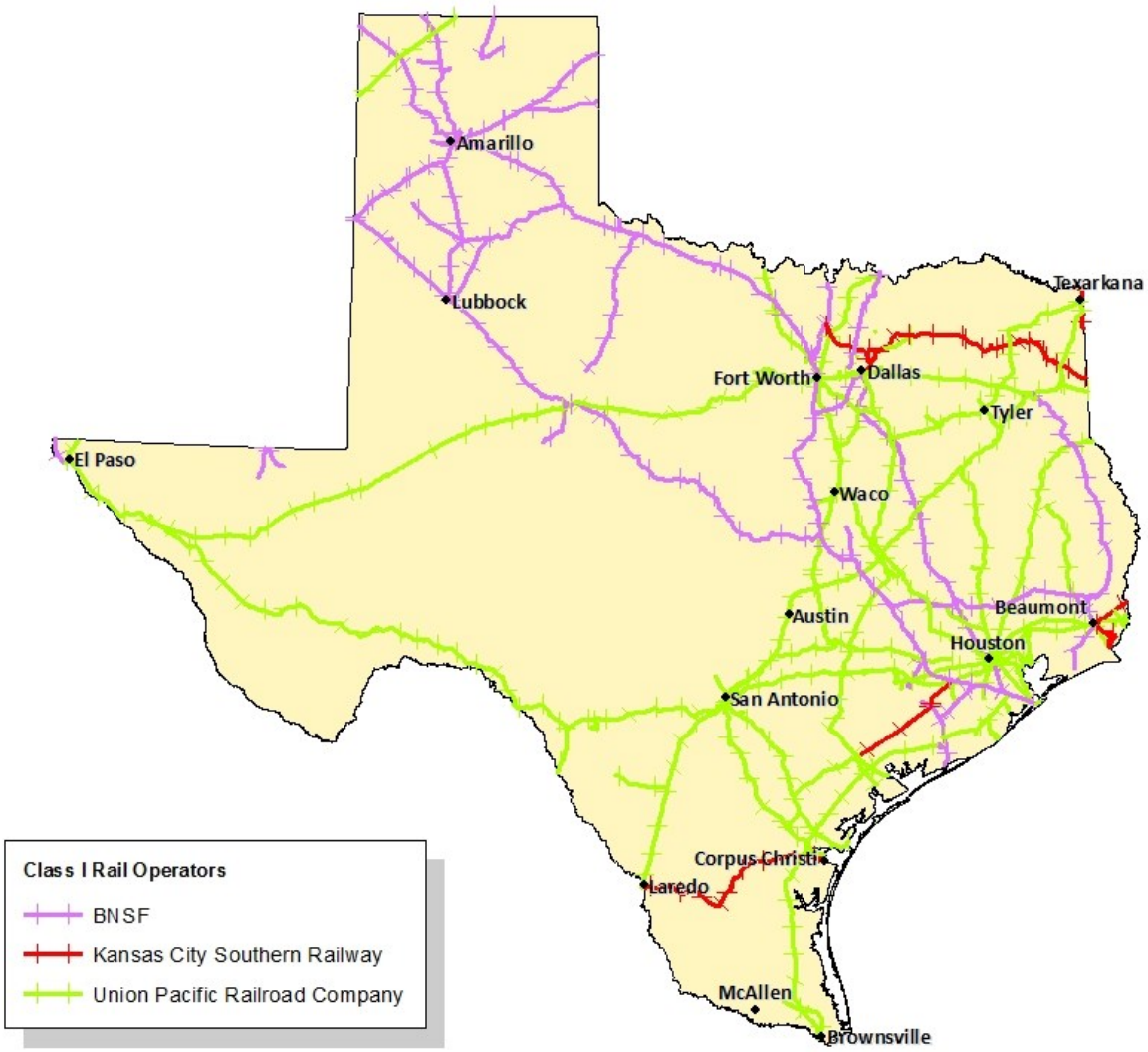
Source: 2015 International scheduled flights to all Texas airports



Source: 2015 International scheduled flights to all Texas airports

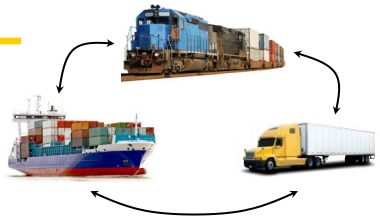
Class I Railroads

- Texas is **No. 1** in the U.S. for freight rail miles with 10,425. (2012)
- In 2014, Texas' total trade value with NAFTA by rail totaled more than **$21 Billion**.
- Three of the country's eight Class I railroads operate in Texas, including **Union Pacific**, **Kansas City Southern**, and the Fort Worth-based **BNSF Railway**.
- In 2014, Texas was the entry point for nearly **91 percent** of all loaded rail containers **crossing into the U.S. from Mexico**.
- Texas is **No. 1** in the U.S. for Freight Rail Employment, with **16,826** workers. (2012)

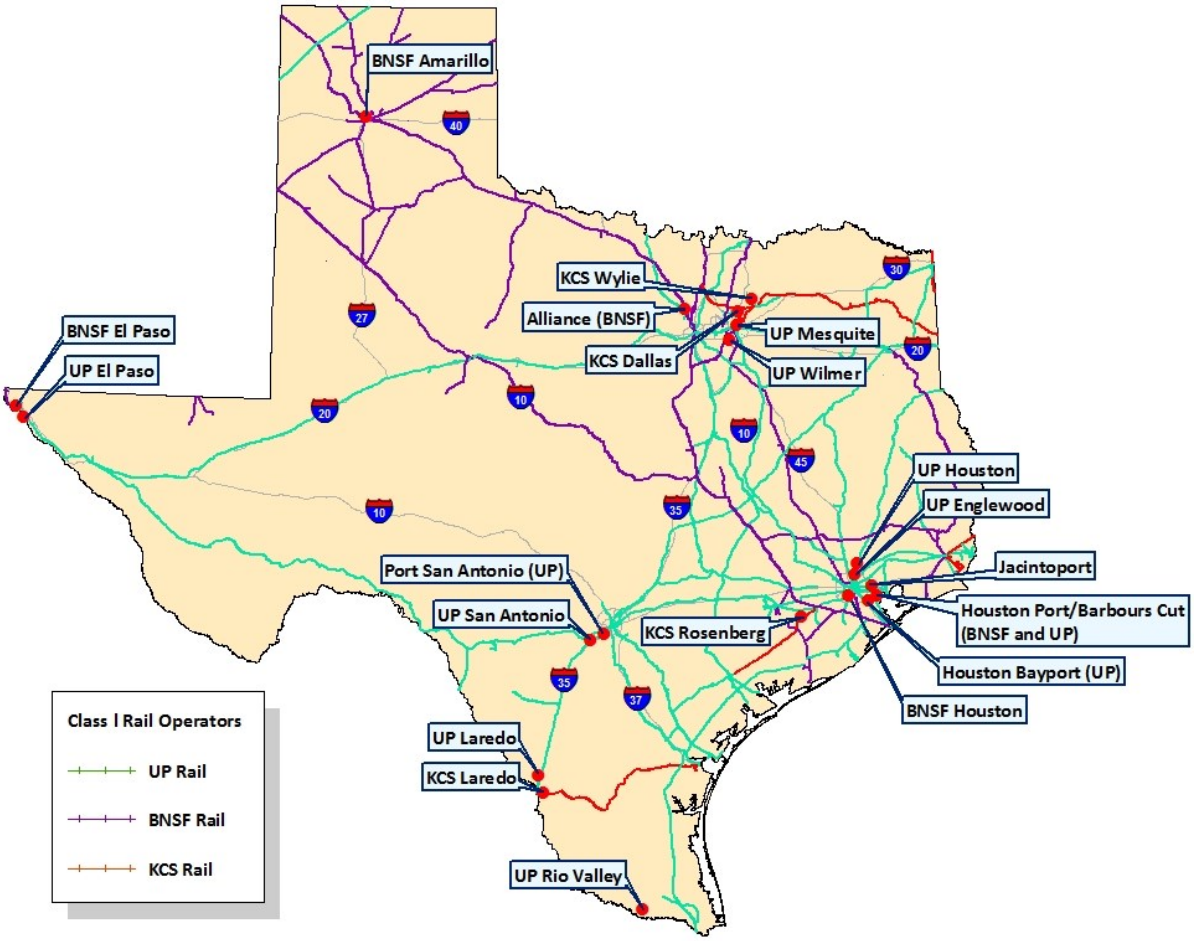


Source: Texas A&M libraries online GIS data

Intermodal Rail Facilities



- **DFW (No.3)** and **Houston (No.12)** are two of the top 15 markets for intermodal rail traffic in the U.S. (2012 data)
- Two Class I railroads, **Union Pacific (UP)** and **BNSF**, operate intermodal facilities at the **Port of Houston**, the nation's second busiest seaport. **Barbours Cut**, one of the port's two container terminals, provides six roll-on/roll-off ship berths, 26 truck lanes, and more than 42 acres of rail spur and track.
- **Kansas City Southern (KCS)** is currently completing a $50 million, 92-acre intermodal facility in **Wylie, TX**. The facility will open in July 2015 and includes **9,400 feet** of track and a **342,000-unit** annual lift capacity.



Source: Texas A&M libraries online GIS data

Intermodal Logistics Facilities Connecting Air, Road, and Rail

Alliance Global Logistics Hub

The **Fort Worth Alliance Airport** is a public-use airport located at the Alliance Texas logistics hub 14 miles north of downtown Fort Worth, Texas. Owned by the City of Fort Worth and managed by Alliance Air Services, Alliance is the world's first purely industrial airport. Opened in 1996, the airport covers an area of 1,198 acres and accommodates air cargo, corporate aviation, and military needs. Features include:

- Runway extension to 11,000 feet is currently underway
- Accommodates all types of commercial traffic
- U.S. Foreign-Trade Zone designation with U.S. Customs on site
- Access to BNSF Railway's Alliance Intermodal Facility
- Direct access to two Class I rail lines, Union Pacific and BNSF
- Access to US interstate highway I-35W from Mexico to Canada and Texas state highways 114 & 170
- Proximity to the Dallas/Fort Worth International Airport

Port San Antonio

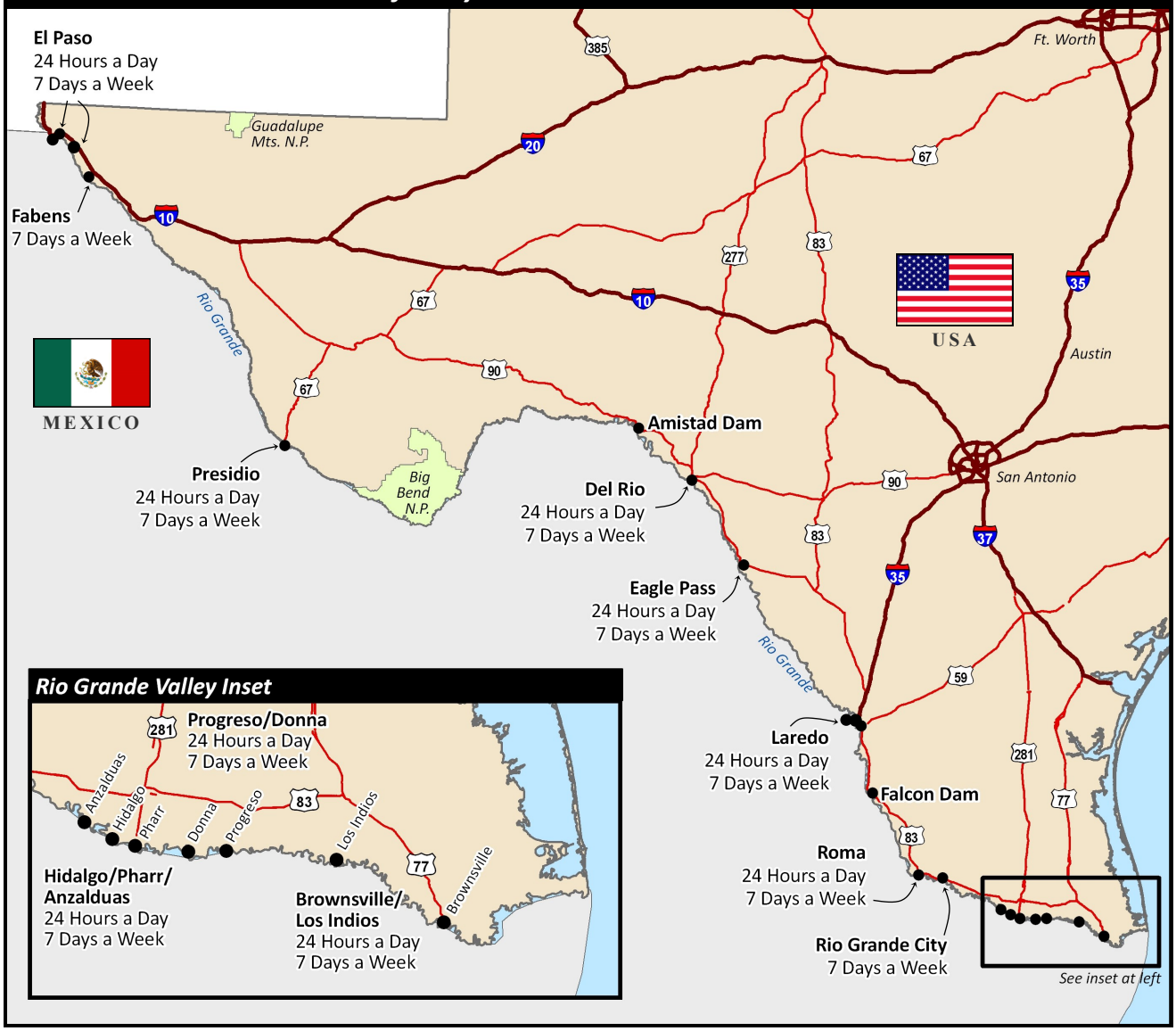
Port San Antonio's industrial airport at Kelly Field (SKF) is a master-planned 1,900-acre aerospace, industrial complex, and international logistics center, centrally located in San Antonio, Texas. Created from the former Kelly Air Force Base, the port's strategic position in North America makes it an ideal international logistics platform for the U.S., Mexico, and South America. Features include:

- 11,500 foot runway
- 89,600-s.f. Class A air-cargo terminal with 14 acres of ramp space
- U.S. Foreign-Trade Zone designation with U.S. Customs on site
- Access to three interstate highways (I-35, I-10, and I-37)
- 235 acres of rail-served warehouses and sites with access to Union Pacific and BNSF rail lines

International Border

- Texas is connected to Mexico by **28 international vehicular bridges**. Seventeen of these crossings accommodate commercial import and export traffic with U.S. Customs services.
- Mexico is the top international destination for **Texas exports**, with more than **$102.5 billion** in goods shipped from Texas to Mexico in 2014.
- Texas dominates U.S.-Mexico border crossings. In 2014, **3.7 million trucks crossed from Mexico into Texas**, more than into all other southern border states combined.
- The **Port of Laredo**, Texas, is the **No. 1** inland port along the entire U.S.-Mexico border in total trade volume and value.

U.S. Customs—Border Ports of Entry

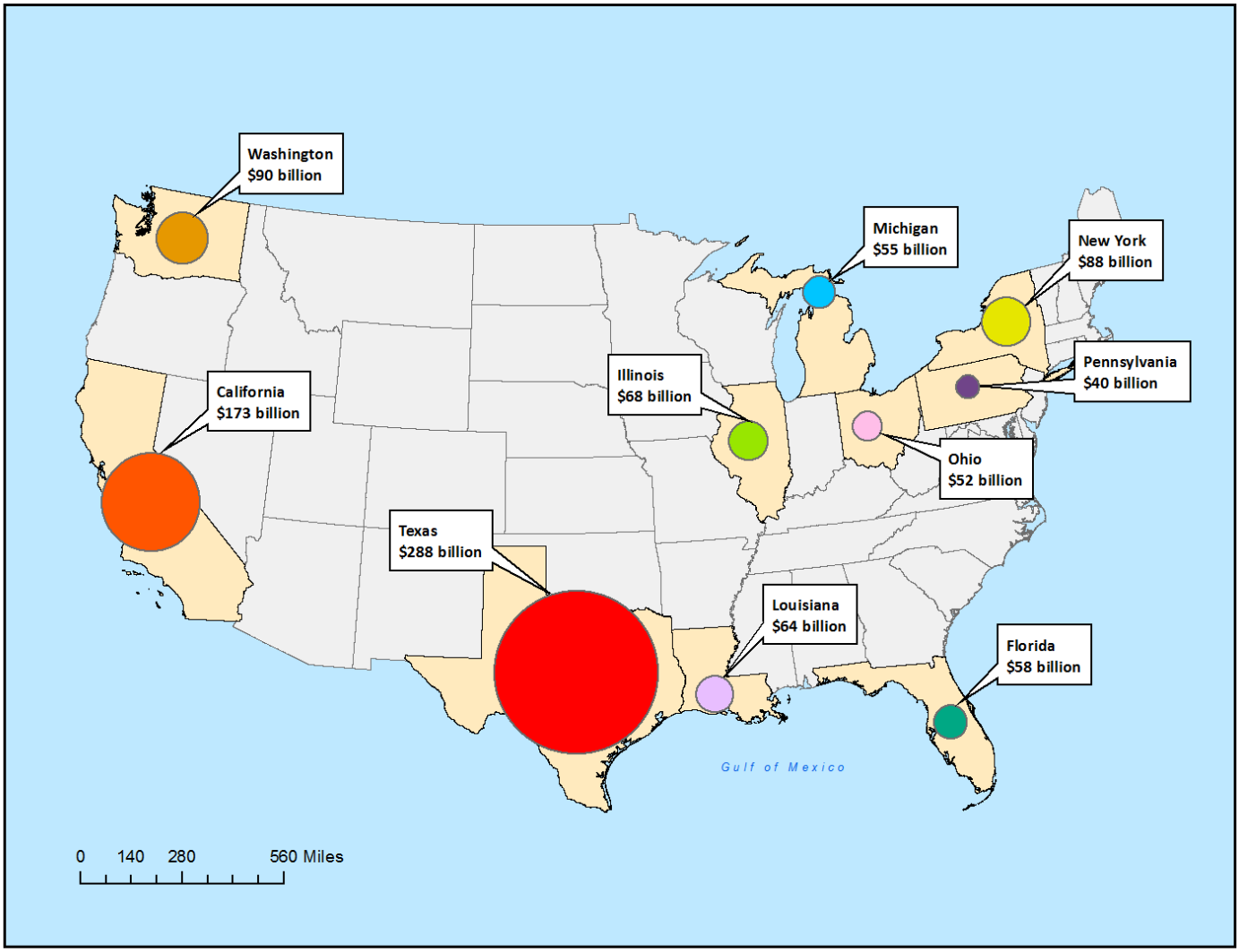


U.S. BTS—Border Crossing/Entry Data

Exports

- In 2014, Texas ranked as the **top state for exports** for the thirteenth consecutive year, with a total of **$288 billion** worth of goods shipped internationally.
- The state's top **export commodities** in 2014 were petroleum and coal products, computer & electronic products, chemicals, machinery, and transportation equipment.
- **Mexico ($102 billion)** was Texas' top **export destination** in 2014, followed by Canada ($31 billion), Brazil ($11 billion) China ($10 billion) and South Korea ($8 billion).
- A planned Liquefied Natural Gas (LNG) facility in Corpus Christi has received final approval to begin construction. The facility, which is expected to start operations by 2018, will include three LNG storage tanks, two carrier docks, and a 22 mile, 48 in. natural gas supply pipeline. Cheniere Energy has been approved to sell 770 million cubic feet per day to counties that aren't U.S. free trade partners.

2014 Top Ten States by Export Value

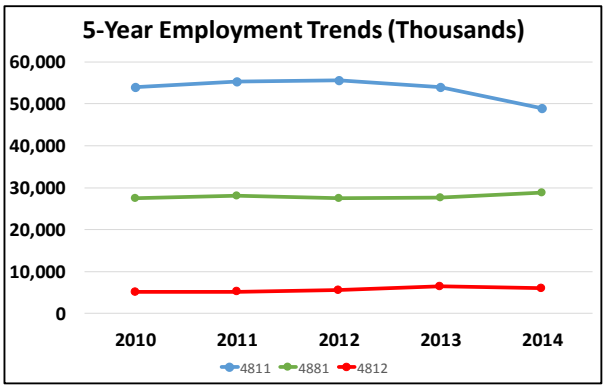


Source: WISERTrade, 2014 Import & Export data

Logistics Work Force

Air Transportation

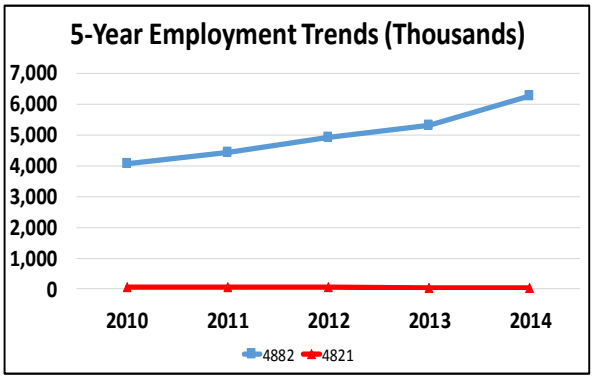
Sector	Industry Code	Firms	Workers	Avg. Wage
Scheduled Air Transportation	4811	83	48,897	$ 79,612
Air Transportation Support	4881	627	28,858	$ 67,288
Non-Scheduled Air Transportation	4812	282	5,577	$ 78,052



Top Texas Companies		HQ or Hub
American Airlines	Airline	*Fort Worth*
Southwest Airlines	Airline	*Dallas*
United Continental	Airline	*Houston*
United Express	Airline	*Houston*
American Eagle Airlines	Airline	*Fort Worth*
Dynamex	Air Freight	*Dallas*

Rail Transportation

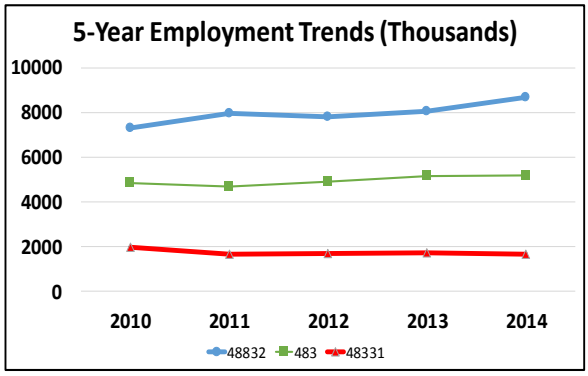
Sector	Industry Code	Firms	Workers	Avg. Wage
Rail Transportation Support	4882	106	6,255	$ 49,920
Rail Transportation	4821	6	28	$ 63,908



Top Texas Companies		HQ City
BNSF Railway	Freight Railroad	*Fort Worth*
BNSF Logistics	Rail Logistics	*Grapevine*
Trans-Global Solutions (TGS)	Rail Services	*Houston*

Water Transportation

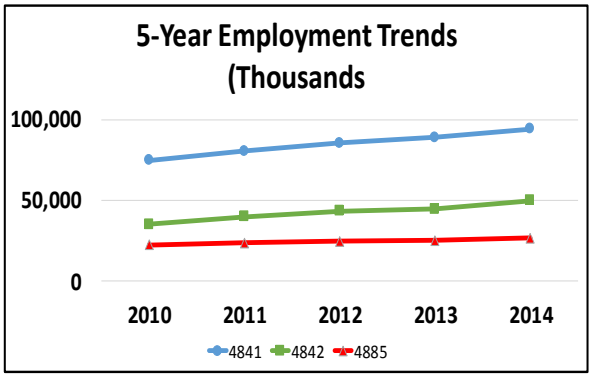
Sector	Industry Code	Firms	Workers	Avg. Wage
Marine Cargo Handling	48832	70	8,674	$ 49,556
Water Transportation	483	161	5,205	$ 92,560
Port & Harbor Operations	48331	36	1,664	$ 64,948



Top Texas Companies		HQ City
Kirby Corp.	Marine Freight	*Houston*
Martin Midstream	Marine Freight	*Kilgore*
Hercules Offshore	Marine Oil Svcs.	*Houston*
Gulfmark Offshore	Marine Oil Svcs.	*Houston*
Mammoet USA	Transport Svcs.	*Rosharon*
Gulf Stream Marine	Port Services	*Houston*

Freight Trucking

Sector	Industry Code	Firms	Workers	Avg. Wage
General Freight Trucking	4841	5,182	94,328	$ 52,000
Specialized Freight Trucking	4842	3,103	50,000	$ 63,960
Freight Transportation Arrangement	4885	2,106	26,687	$ 62,452



Top Texas Companies		HQ or Hub
Greatwide Logistics	Freight Services	*Dallas*
CEVA Logistics	Freight Services	*Houston*
Stevens Transport	Freight Services	*Dallas*
FFE Transportation Svcs.	Freight Services	*Dallas*
Central Freight Lines	Freight Services	*Waco*
TTS, LLC	Truck Logistics	*Frisco*

Sources

Deep Water Sea Ports

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- National Association of Foreign-Trade Zones http://www.naftz.org/publications/2012-state-by-state-studies/
- Texas Department of Transportation, *Texas Port Report*, June 2014

Commercial Airports

- Federal Aviation Administration (FAA) www.faa.gov/airports/planning_capacity/passenger_allcargo_stats/passenger
- Airports Council International, http://www.aci.aero/
- Airport Websites

Class I Railroads

- American Association of Railroads www.aar.org/KeyIssues/Railroads-States.aspx
- U.S. Bureau of Transportation Statistics (BTS)—Border Crossing/Entry Data www.bts.gov/programs/international/transborder/TBDR_BC/TBDR_BC_Index.html
- U.S. BTS—State Transportation Facts http://gis.rita.dot.gov/StateFacts/StateFacts.aspx?StateName=Texas
- Texas A&M Library GIS Data https://library.tamu.edu/about/collections/map-gis-collections-services/gis-data-online-interactive-maps/gis-online-data.html

International Border

- U.S. BTS—Border Crossing/Entry Data www.bts.gov/programs/international/transborder/TBDR_BC/TBDR_BC_Index.html

Intermodal Rail Facilities

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- Port of Houston Authority www.portofhouston.com
- American Association of Railroads, "Rail Intermodal Keeps America Moving" https://www.aar.org/BackgroundPapers/Rail%20Intermodal.pdf.
- WISERTrade, U.S. Exports to US NAFTA Partners www.wisertrade.org

Exports

- WISERTrade, U.S. Exports Data www.wisertrade.org
- Fuel Fix, http://fuelfix.com/blog/2015/05/13/feds-hand-key-lng-export-license-to-chenieres-corpus-christi-project

Logistics Work Force

- Texas Workforce Commission, Quarterly Census of Employment and Wages www.tracer2.com/cgi/dataAnalysis/AreaSelection.asp?tableName=Industry
- U.S. Department of Labor, Bureau of Labor Statistics http://www.bls.gov/ces/
- Company Websites

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