TEXAS: THE LOGISTICAL HEART OF NORTH AMERICA

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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 its 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

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)

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
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.

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.

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.

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.
2015 Texas Nonstop Flight Destinations in Mexico

Nonstop flights from IAH
Nonstop flights from DFW
Nonstop flights from SAT
Nonstop flights from DFW & IAH
Nonstop flights from multiple airports (listed)

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
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

- El Paso
  - 24 Hours a Day
  - 7 Days a Week
- Fabens
  - 7 Days a Week
- Presidio
  - 24 Hours a Day
  - 7 Days a Week
- Del Rio
  - 24 Hours a Day
  - 7 Days a Week
- Eagle Pass
  - 24 Hours a Day
  - 7 Days a Week
- Laredo
  - 24 Hours a Day
  - 7 Days a Week
- Roma
  - 24 Hours a Day
  - 7 Days a Week
- Rio Grande City
  - 7 Days a Week

See inset at left

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

<table>
<thead>
<tr>
<th>Sector</th>
<th>Industry Code</th>
<th>Firms</th>
<th>Workers</th>
<th>Avg. Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled Air Transportation</td>
<td>4811</td>
<td>83</td>
<td>48,897</td>
<td>$ 79,612</td>
</tr>
<tr>
<td>Air Transportation Support</td>
<td>4881</td>
<td>627</td>
<td>28,858</td>
<td>$ 67,288</td>
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<tr>
<td>Non-Scheduled Air Transportation</td>
<td>4812</td>
<td>282</td>
<td>5,577</td>
<td>$ 78,052</td>
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Rail Transportation

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<tr>
<th>Sector</th>
<th>Industry Code</th>
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<th>Avg. Wage</th>
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<tbody>
<tr>
<td>Rail Transportation Support</td>
<td>4882</td>
<td>106</td>
<td>6,255</td>
<td>$ 49,920</td>
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<tr>
<td>Rail Transportation</td>
<td>4821</td>
<td>6</td>
<td>28</td>
<td>$ 63,908</td>
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Top Texas Companies

Airline
- American Airlines
- Southwest Airlines
- United Continental
- United Express
- American Eagle Airlines
- Dynamex
Air Freight
- Fort Worth
- Dallas
- Houston
- Fort Worth
- Dallas

5-Year Employment Trends (Thousands)

Top Texas Companies

Freight Railroad
- BNSF Railway
- BNSF Logistics
- Trans-Global Solutions (TGS)
Rail Logistics
- Fort Worth
- Grapevine
- Houston
Rail Services
Water Transportation

<table>
<thead>
<tr>
<th>Sector</th>
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<th>Firms</th>
<th>Workers</th>
<th>Avg. Wage</th>
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<tbody>
<tr>
<td>Marine Cargo Handling</td>
<td>48832</td>
<td>70</td>
<td>8,674</td>
<td>$49,556</td>
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<tr>
<td>Water Transportation</td>
<td>483</td>
<td>161</td>
<td>5,205</td>
<td>$92,560</td>
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<tr>
<td>Port &amp; Harbor Operations</td>
<td>4831</td>
<td>36</td>
<td>1,664</td>
<td>$64,948</td>
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5-Year Employment Trends (Thousands)

Top Texas Companies

<table>
<thead>
<tr>
<th>Kirby Corp.</th>
<th>Marine Freight</th>
<th>Houston</th>
</tr>
</thead>
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<tr>
<td>Martin Midstream</td>
<td>Marine Freight</td>
<td>Kilgore</td>
</tr>
<tr>
<td>Hercules Offshore</td>
<td>Marine Oil Svcs.</td>
<td>Houston</td>
</tr>
<tr>
<td>Gulfmark Offshore</td>
<td>Marine Oil Svcs.</td>
<td>Houston</td>
</tr>
<tr>
<td>Mammoet USA</td>
<td>Transport Svcs.</td>
<td>Rosharon</td>
</tr>
<tr>
<td>Gulf Stream Marine</td>
<td>Port Services</td>
<td>Houston</td>
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Freight Trucking

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<tr>
<th>Sector</th>
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<th>Firms</th>
<th>Workers</th>
<th>Avg. Wage</th>
</tr>
</thead>
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<tr>
<td>General Freight Trucking</td>
<td>4841</td>
<td>5,182</td>
<td>94,328</td>
<td>$52,000</td>
</tr>
<tr>
<td>Specialized Freight Trucking</td>
<td>4842</td>
<td>3,103</td>
<td>50,000</td>
<td>$63,960</td>
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<tr>
<td>Freight Transportation Arrangement</td>
<td>4885</td>
<td>2,106</td>
<td>26,687</td>
<td>$62,452</td>
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5-Year Employment Trends (Thousands)

Top Texas Companies

| Greatwide Logistics          | Freight Services | Dallas |
| CEVA Logistics               | Freight Services | Houston |
| Stevens Transport            | Freight Services | Dallas |
| FFE Transportation Svcs.     | Freight Services | Waco   |
| Central Freight Lines        | Freight Services | Dallas |
| TTS, LLC                     | Truck Logistics  | Frisco |
Sources

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- Texas Department of Transportation, Texas Port Report, June 2014

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- Federal Aviation Administration (FAA)  www.faa.gov/airports/planning_capacity/passenger_allcargo_stats/passenger
- Airport Websites

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- Company Websites