



Economic Alliance Annual Report

City of Deer Park
June 1, 2021

Presented By:
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Economic Alliance Houston Port Region
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Our Mission

A non-profit organization, created in 1985, whose mission is to *grow and market a vibrant regional economy.*



Our Footprint

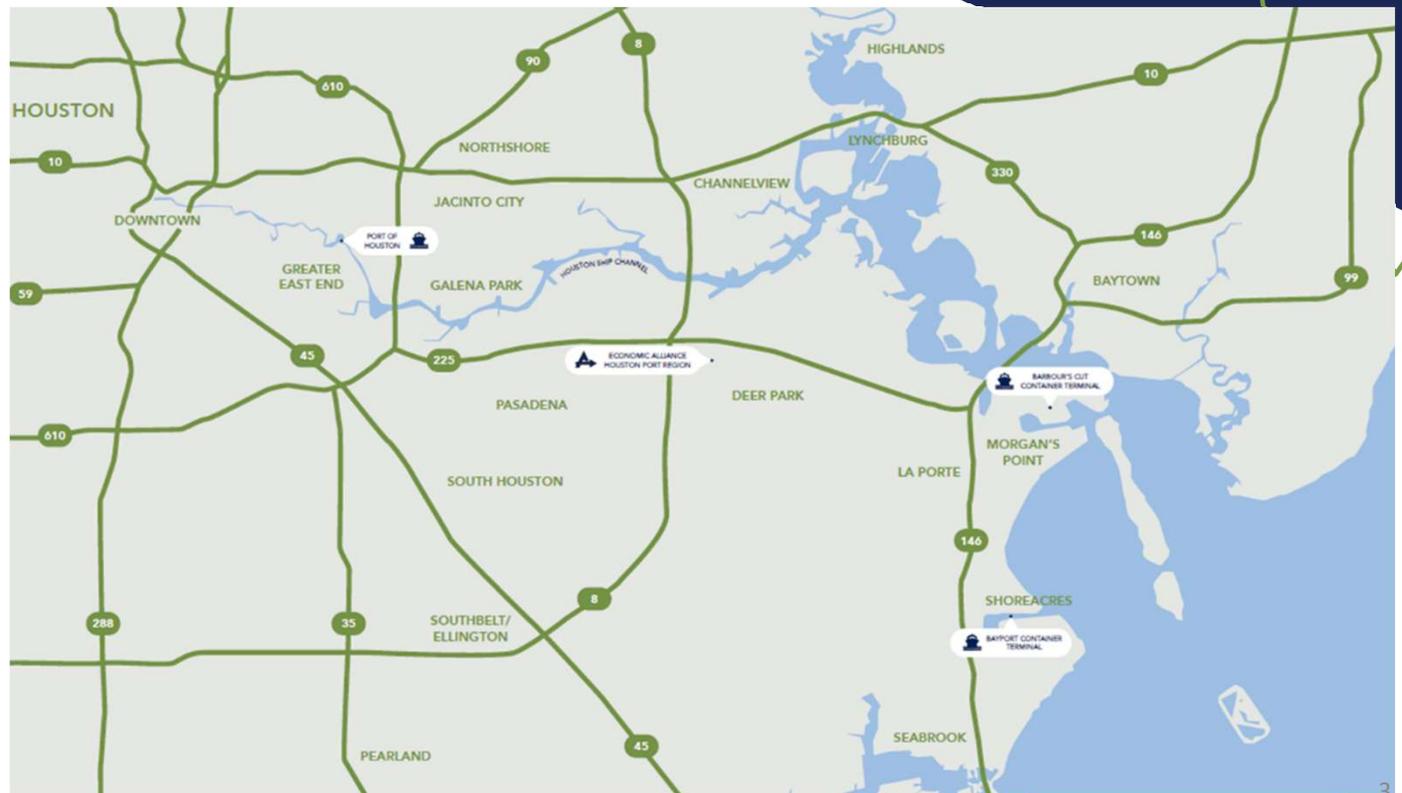
Most sought-after region in the world for petrochemical, manufacturing, maritime and logistics operations.

25 miles of the Houston Ship Channel:

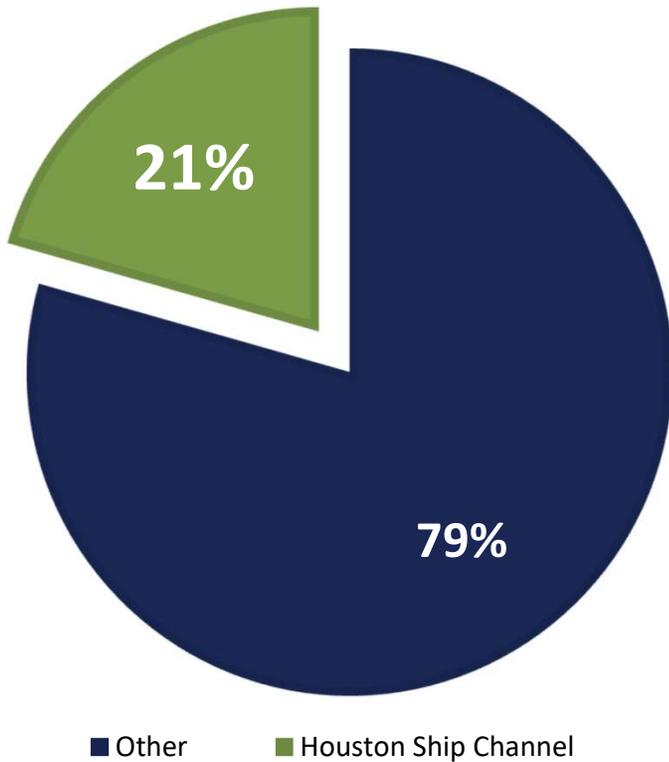
1. World's largest petrochemical complex
2. Nation's busiest port in terms of foreign tonnage

12 Cities, Harris County, Port Houston

250+ Private Sector Members



State GDP along HSC



In 2018, the Houston Ship Channel

- generated nearly **\$802 billion** in U.S. economic value
- supported **3.2 million jobs**
- provided **\$38 billion in tax revenue**

In Texas, it

- generated **\$339 billion** in economic value
- sustained **1.3 million jobs**
- generated **\$5.6 billion in state and local tax revenue**

COVID-19 Impact on Vessel Movements

Vessel Arrivals by Port, March 2021 YTD vs. 2020 YTD

	2021 YTD	2020 YTD		Percent Change
BROWNSVILLE	67	81		BROWNSVILLE, -17.3%
CORPUS CHRISTI	556	594		CORPUS CHRISTI, -6.4%
FREEPORT	311	309		FREEPORT, 0.6%
GALVESTON	271	308		GALVESTON, -12.0%
HOUSTON	1,762	2,032		HOUSTON, -13.3%
PORT LAVACA	41	64		PORT LAVACA, -35.9%
SABINE	613	692		SABINE, -11.4%
TEXAS CITY	182	278		TEXAS CITY, -34.5%
GRAND TOTAL	3,803	4,358		GRAND TOTAL, -12.7%

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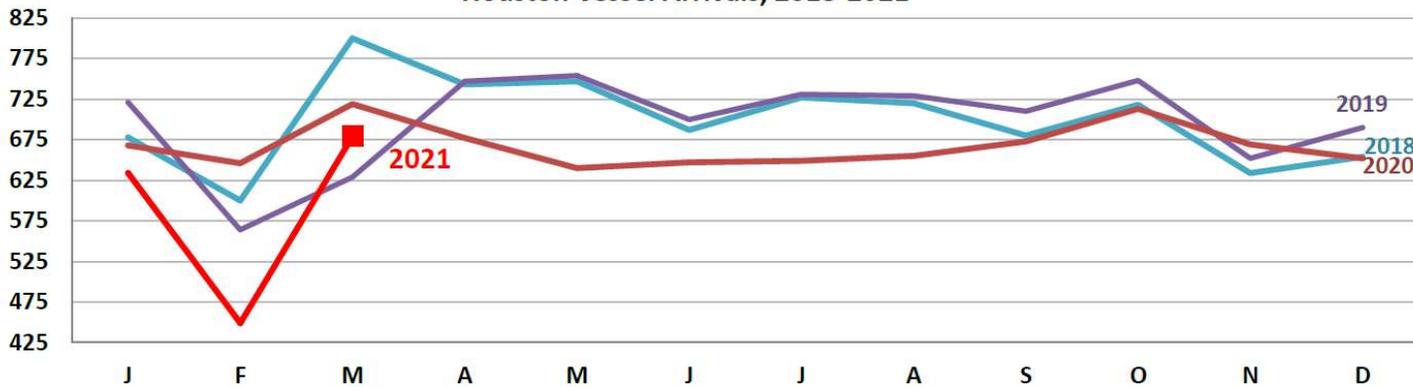
COVID-19 Impact on Vessel Movements



Produced using the Harborlights Vessel Tracking System &
 The Marine Exchange of Texas
 4400 Highway 225 E., Ste.200, Deer Park, Texas 77536 (PH) 713-678-4300



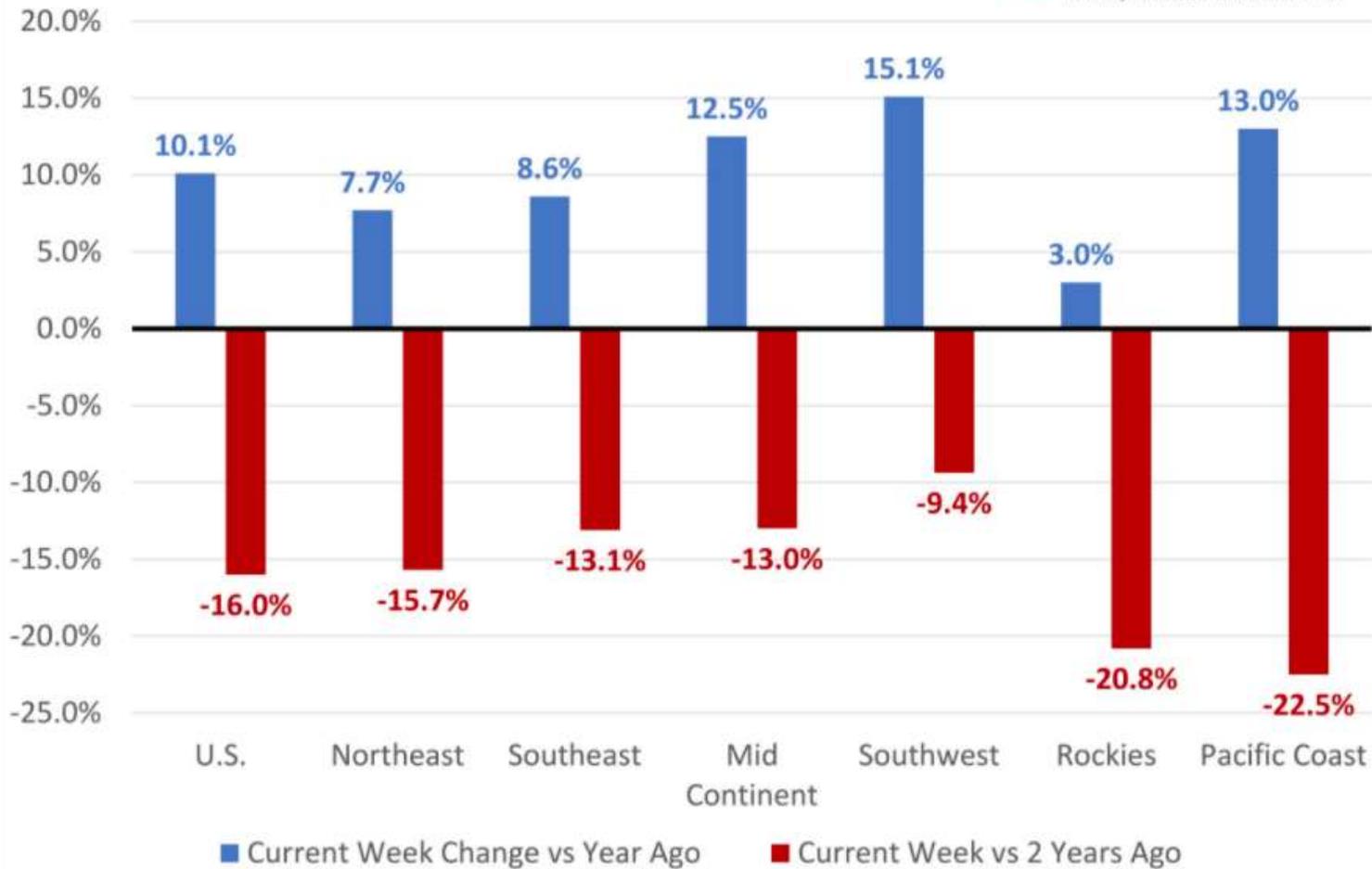
Houston Vessel Arrivals, 2018-2021



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OPIS Demand: Gasoline Volume Change vs Last Year and vs 2-Years Ago

DemandPro
The Industry's Most-Reliable Fuel Volumes Benchmark

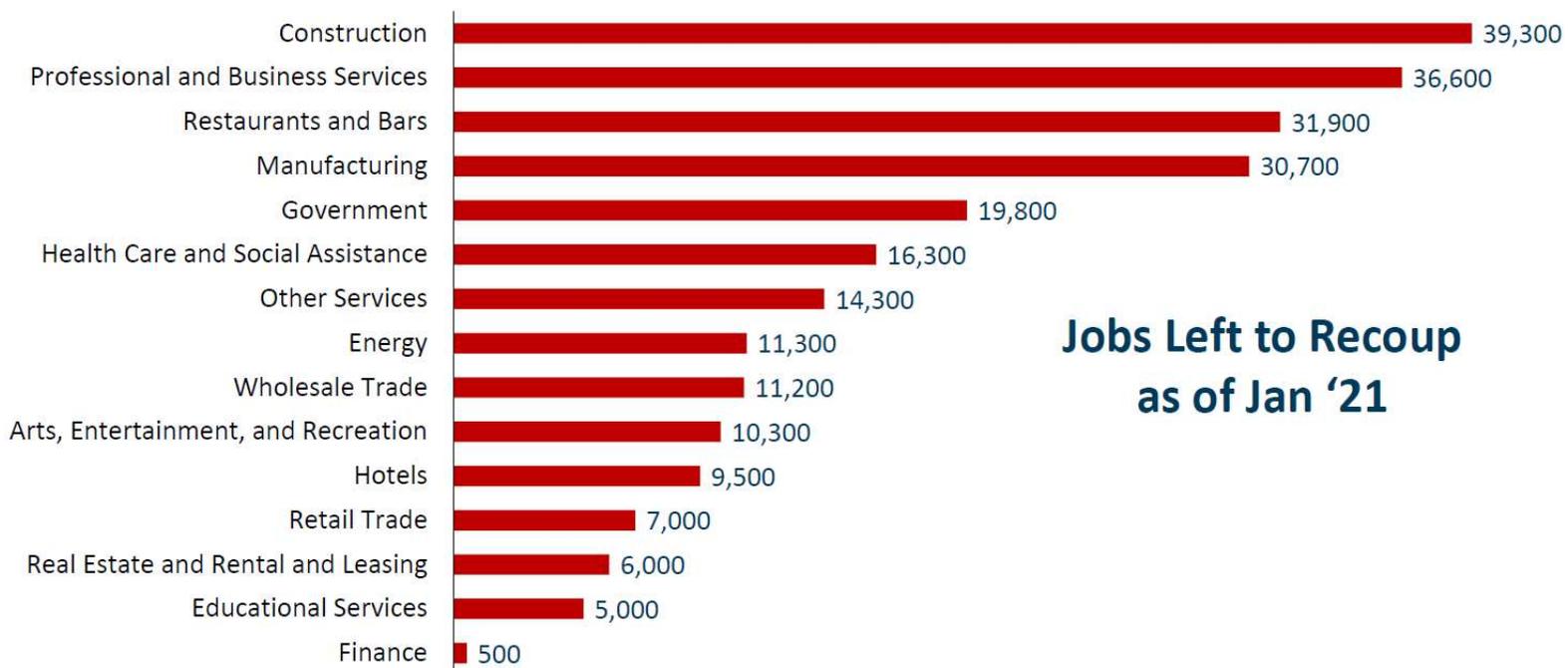


Job Losses Since Peak

Losses, Mar + April	-361,400
Gains, May to Dec	+164,900
Losses, Jan '21	-47,900
<hr/>	
Gap to Close*	-244,400

* Returns metro Houston to February '20 employment levels

Many sectors have a long way to go to full recovery.



**Jobs Left to Recoup
as of Jan '21**



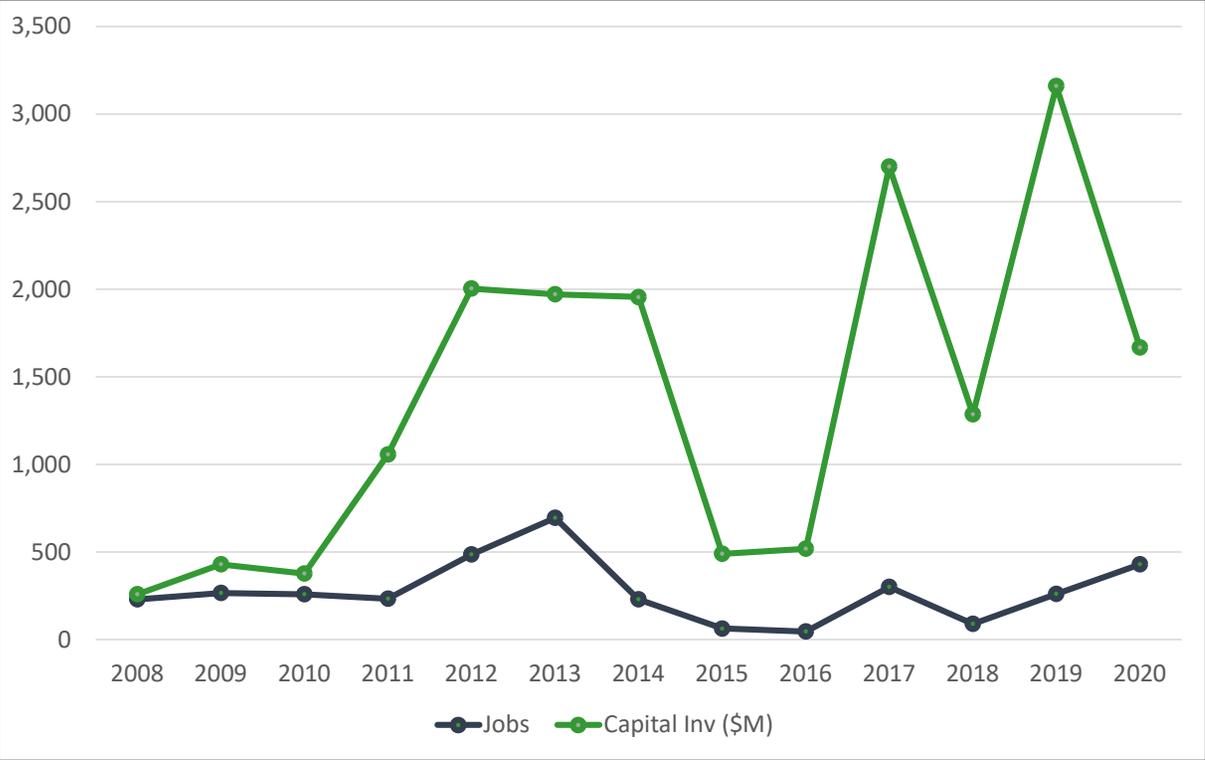
Economic Development

Professional Services

Provide a professional relationship to navigate the multiple facets of the site selection/expansion process, including access to our economic development support network.

- Conduct **real estate searches**
- Participate in and coordinate **site-selection tours**
- Facilitate **access to data**
- Provide guidance in evaluating State and Local incentive **permitting and workforce programs**
- **Advocate** for projects and **mobilize** of key members

Economic Alliance Project Wins, Jobs and Capital Investment by Year



Totals since 2008:
 69 Wins - 5.3/year
 \$14.3 B Capital Investment
 3,584 Jobs Created

Impact on the Houston Port Region

2019 Economic Development Project Wins:

\$2.9 B Capital Investment; 285 Total Jobs



2020 Economic Development 6 Project Wins:

\$897 M Capital Investment; 468 Total Jobs



2021 YTD Economic Development Project Wins:

\$2 B Capital Investment; 80 Total Jobs

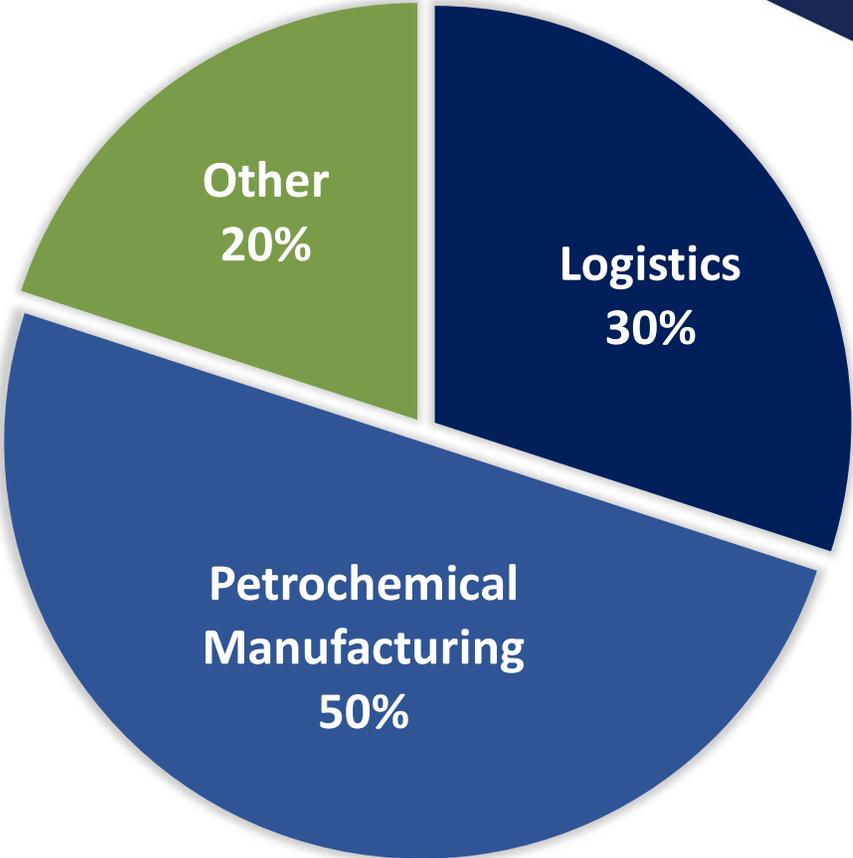


Current Project Pipeline Breakdown

TOTAL PROJECTS
21

POTENTIAL DIRECT
JOB CREATION
890

POTENTIAL CAPITAL
INVESTMENT
\$6.8 B



Why focus on the Petrochemical Industry?

For every one job created from the business of chemistry,
7.1 jobs are created in other sectors.

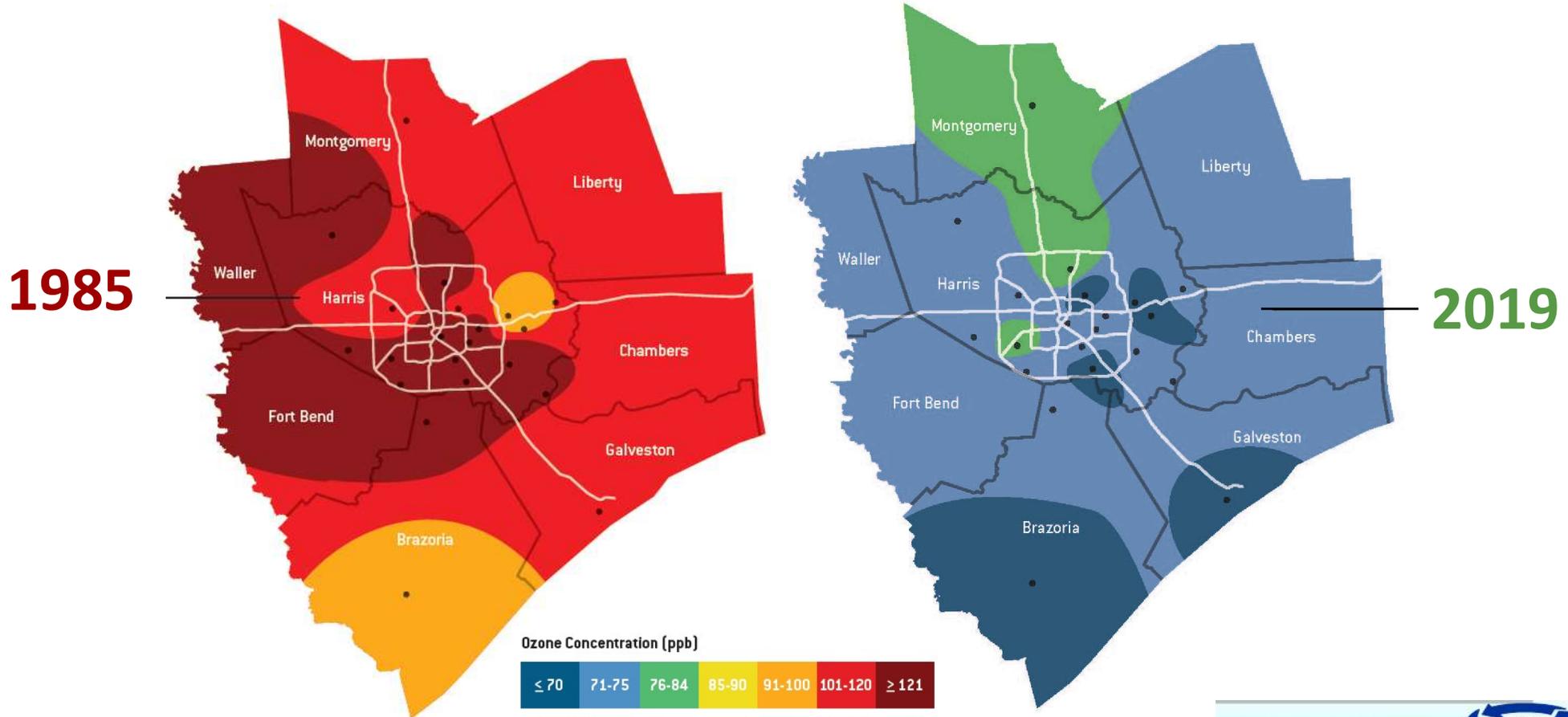
In addition, the average annual salary of a U.S. chemical industry employee in Texas is \$106,707, which is 46 percent **higher** than the average U.S. manufacturing pay.





Transportation

8-Hour Ozone Design Values



In 1997, EPA set the 8-hour ozone standard at 84 ppb, lowered it to 75 ppb in 2008, and lowered it, again, to 70 ppb in 2015.



Committee of Regional Transportation Stakeholders

- Regional Mayors
- East Harris County Manufacturer's Association (130+ plants)
- Port Houston
- Harris County
- Texas Department of Transportation
- Houston Galveston Area Council

This committee addresses critical issues associated with the movement of Freight and Commuters.

Houston Port Region Freight Improvement Strategic Plan

#	Project	Priority	Info & Updates
1	Barbours Cut Connectivity to SH-146	H/S	TxDOT is working on a design for restriping Barbours Cut Blvd, will need to continue to work to identify a long term connectivity solution
2	SH-146 Widening - Fairmont to Red Bluff Road	H/S	Widen to 6 main lanes, environmentally cleared, Final design underway/anticipated to let in Fall 2022.
3	SH-225 expansion/improvement (8-East 146)	H/S	TxDOT is working on a feasibility study for SH 225 from I-610 to SH 146. completion Q3 2018
4	Broadway Double Track Project	H/S	Construction is underway, should complete in 2019
5	Grand Parkway NE Segments H & I	H/S	Design-Build Project/recently awarded. The total cost of this project is approximately \$1.4 Billion. Estimated completion date is February 2022. Construction to begin Summer 2018
6	FM-1942 from Hatcherville Road to SH-146 – road improvement	H/S	
7	Hatcherville Rd from FM-1942 to Liberty/Chambers Co.Line – road widening	H/S	No improvements are currently planned
8	FM 565 from SH-146 to SH-99 – widening and addition of turning lanes	H/S	MPOID 17113; FY 2024 Project from FM 1409 to SH 99: Reconstruct and realign roadway is anticipated to let for construction in FY 2018
9	Peninsula Road Widening and Rail Crossing Improvement	H/S	Notice To Proceed was issued 12/2018, the rail crossing improvements are already underway, Project is in construction. Widen Peninsula road to 4 lanes (3 inbound and 1 outbound) and make improvements to up to 6 rail crossings
10	SH-99 and I-45 direct connectors for trucks heading from PH to Dallas and Dallas to PH	H/M	Identified to TxDOT in March 2018
11	BW-8 Direct Connectors @ SH-225: Westbound on 225 to 8 N, Northbound on 8 to E/W 225, Eastbound on 225 to 8S	H/M	Working with HCTRA, construction of 4 connectors is funded, applied for Federal Grant for the remaining work, environmental studies underway, No ROW needed, anticipated letting in 2021, estimate construction cost for entire interchange is \$180 Million
12	SH146 from 110 to Business 146 (Alexander Drive)		The grade separation/freeway starts at Alexander and continues all the way to Red Bluff. There probably needs to be some work on SH146 North of 110 through Mont Belvieu also
13	Penn City Connector	H/M	Need to develop a business case analysis for project
14	Barbours Cut Blvd expansion to 6 lanes	H/M	Need to develop a business case analysis for project
15	SH-225 expansion/improvement (8-West 610)	H/M	
16	I-69 Bypass (feasibility of a bypass on the East side of Houston is being considered)	H/M	Potentially starting as far South as Wharton and tying as far North as Cleveland. Potential to use SH 99 Seg. H & I. Southern Section of an I-69 Bypass is being discussed through HGAC. TxDOT is beginning an Origin-Destination Study (O-D) to determine how many trucks would use the route.
17	Fairmont Parkway (Turning improvements)	H/M	Under construction County and La Porte funded through TxDOT Grant
18	SH-225 and I-610 Interchange	H/L	TxDOT is working with H-GAC to begin a feasibility study for SH 225 from I-610 to SH 146
19	I-610 bridge at HSC	H/L	Additional meetings with the Economic Alliance are requested to identify the needs and project scope at this location
20	Fairmont Parkway (Widening)	H/L	Widening is recommended from Canada Rd to SH 146. There are at least 3 major freight generators on the south side of Fairmont in this area.
21	Port Road Phase 3 & Drainage	M/M	Design is underway, expected to let in Q4 2019
22	SH-330 (improve northbound connectivity to I-10 - 2 lanes or direct connect)	M/M	Construct Northbound to Eastbound connection. Working to secure construction funding. Anticipated environmental clearance – Summer 2018. The estimated let date is Spring 2022
23	Independence Parkway (improve Northbound connectivity to SH-225)	M/M	Dedicated turning lane. Getting those trucks in and out of Ind. Blvd. Increase turning capacity
24	Spencer Highway Bridge (Bayport Rail Mainline) at Fairmont	M/L	MPOID 10532; FY 2018
25	Bayport Mainline Rail Track	M/L	MPOID 10455; Need business case to support investment
26	Sheldon Road expansion	M/L	Project has been submitted to HGAC TIP Call for Projects.
27	Applet Road (Sheldon to Market)	M/L	
28	Jacintoport Road Improvement	L/L	Also on the Primary Highway Freight System, thereby eligible for federal freight funding
29	Jacintoport Direct Connectors	L/L	Direct Connect makes it a TxDOT/HCTRA discussion
30	Haden Rd (extension to Penn City Rd)	L/L	County roadway/POHA
TxDOT Projects shaded			Priority Level: Time Frame Required:
Harris County Projects			H-HIGH Priority / S-SHORT Term 0-5 yrs
			M-MEDIUM Priority / M-MID Term 5-10 yrs
			L-LOW Priority / L-LONG Term 10+ yrs

Ready to Let: 2021 or Earlier
Estimated Amount: \$180 Million



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Economic Alliance
HOUSTON PORT REGION

**BELTWAY 8 DIRECT
CONNECTORS AT SH225**

PROJECT NO.
20 **9**



SH 225 East

TxDOT is working on a feasibility study for SH 225 from I-610 to SH 146.

Completion: Q3 2018

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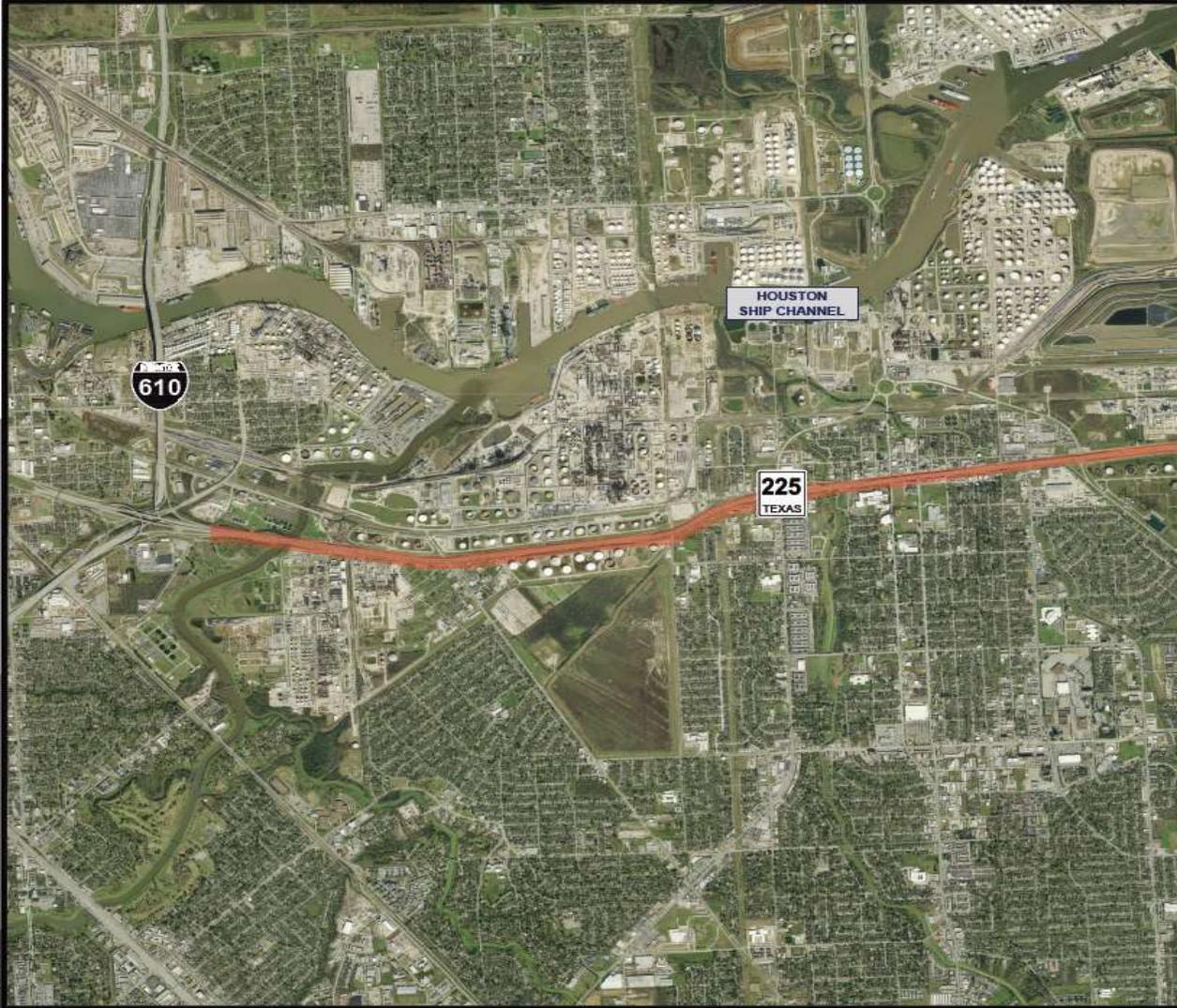
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SH225 EXPANSION

PROJECT NO.
 21 **3**



SH 225 West

TxDOT is working on a feasibility study for SH 225 from I-610 to SH 146.

Completion: Q3 2018

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SH 225 EXPANSION

PROJECT NO.
22 **12**

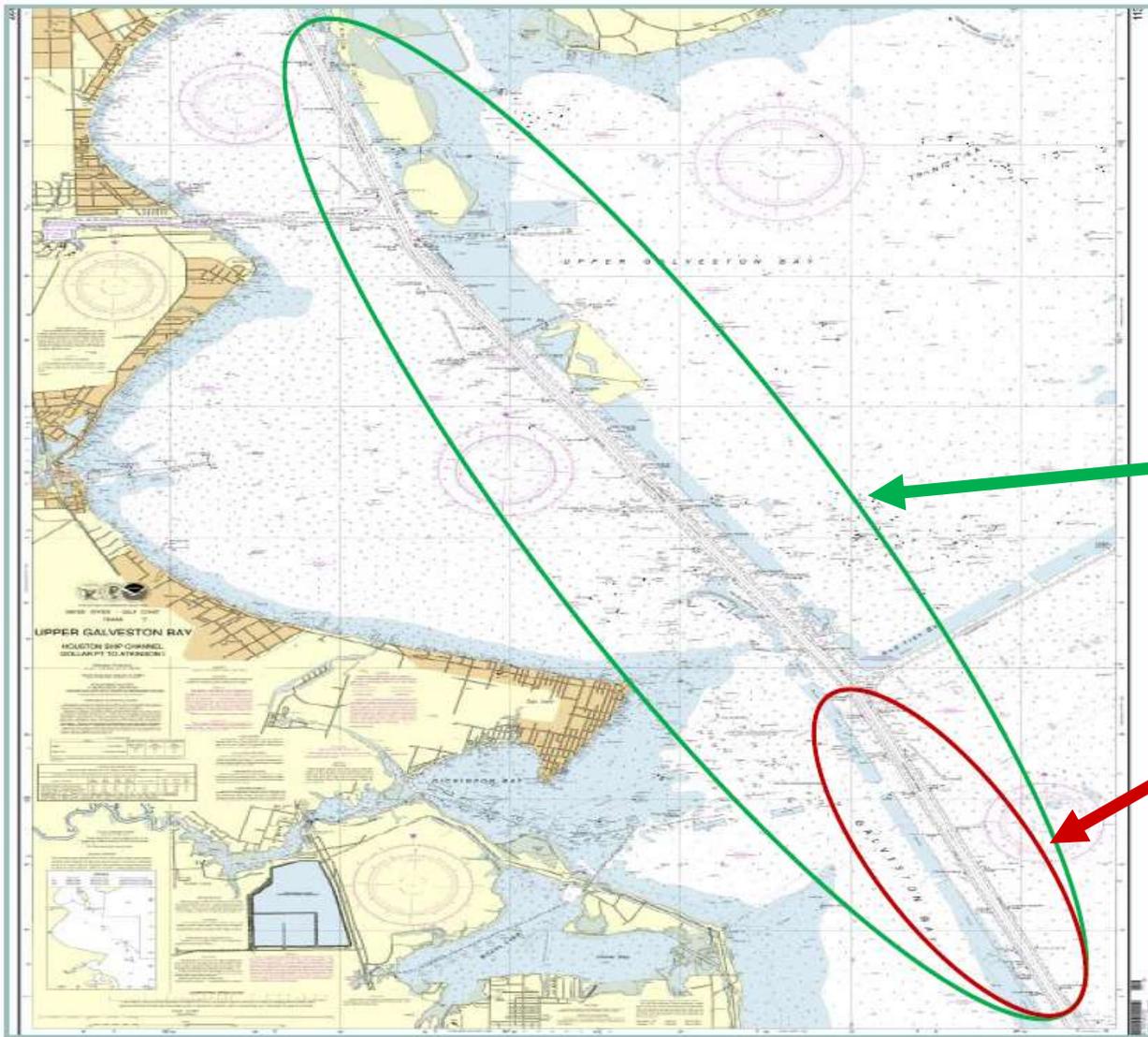
SH 225 PEL - Draft Study Area





Ship Channel Infrastructure





**Scope of Contemplated
Locally Preferred Plan**

**Original Army Corps.
Proposal**



Public Policy

Public Policy

2021 – State Policy

Economic Alliance White Paper and Austin visits.

2019 – Federal Policy

31 Economic Alliance Members participated in 35 meetings in Washington D.C.

Federal White Paper Considerations

- Port Infrastructure – Widening Project
- Workforce Investment
- EXIM Bank Reauthorization
- Storm Surge Protection

State White Paper Considerations

- Chapter 312 – **Reauthorized**
- Coastal Spine Taxing Authority – **Passed**
- Workforce HB2214 – Deployment to Employment – **Passed**
- Texas Emissions Reduction Plan – **Passed**
- Expedited Permitting – **Passed**





Leading the Conversation in Industry

Informing the Nation

September 23, 2021

12th Annual Conference of National Industry Leaders

The Gulf Coast Industry Forum brings together industry leaders focused on petrochemicals, energy and logistics.

2020 Virtual Events

- +2,500 Attendees
- 40 Exhibiting Companies and Institutions

Industry and Market Insight

- Petrochemical Leadership Panel
- Midstream Oil & Gas Report
- Freight Mobility Panel
- Regulations and Policy Update
- Port Houston Update
- U.S. Senator John Cornyn
- U.S. Congressional Panel
- Environmental & Regulatory Panel



Gulf Coast Industry Forum
AN ECONOMIC ALLIANCE HOUSTON PORT REGION EVENT



-2020 Gulf Coast Industry Forum

PETROCHEMICAL LEADERSHIP PANEL

MODERATED BY:

JIM GRIFFIN
ASSOCIATE VICE CHANCELLOR AND
SENIOR VICE PRESIDENT
FOR THE PETROCHEMICAL
TRAINING DIVISION
SAN JACINTO COLLEGE - CPET

KATE LIGHTFOOT
PLANT MANAGER
EXXONMOBIL

KIM FOLEY
VICE PRESIDENT OF HSEQ
LYONDELLBASELL

CATHY CULPEPPER
SITE DIRECTOR
INEOS STYROLUTIONS

zoom
#IndustryForum2020

Includes paid promotion

120 Gulf Coast Industry Forum



Quality of Life Grant Program

San Jacinto Texas Historic District awards grants to entity's during a pandemic year

- Imelda Assistance Fund established by Houston Mayor Sylvester Turner and Harris County Judge Lina Hidalgo; 2 - \$5,000 matching grants – totaling **\$10,000**
- Harris County Precinct 2gether Dolly Parton Imagination Library; 4 - \$5,000 matching grants – totaling **\$20,000**
- City of Morgan's Point Elevated Storage Tank Painting; **\$5,000** matching grant
- **2021** - The Bridge Over Trouble Waters women's shelter, capital campaign to expand and create "The Bridge for Kids" center to help support hundreds of kids impacted by family violence and homelessness; **\$5,000** matching grant





Thank you!

www.allianceportregion.com

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