



USACE, Galveston District (SWG) Summer Stakeholder Partnering Forum

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Economic Alliance

Our Mission

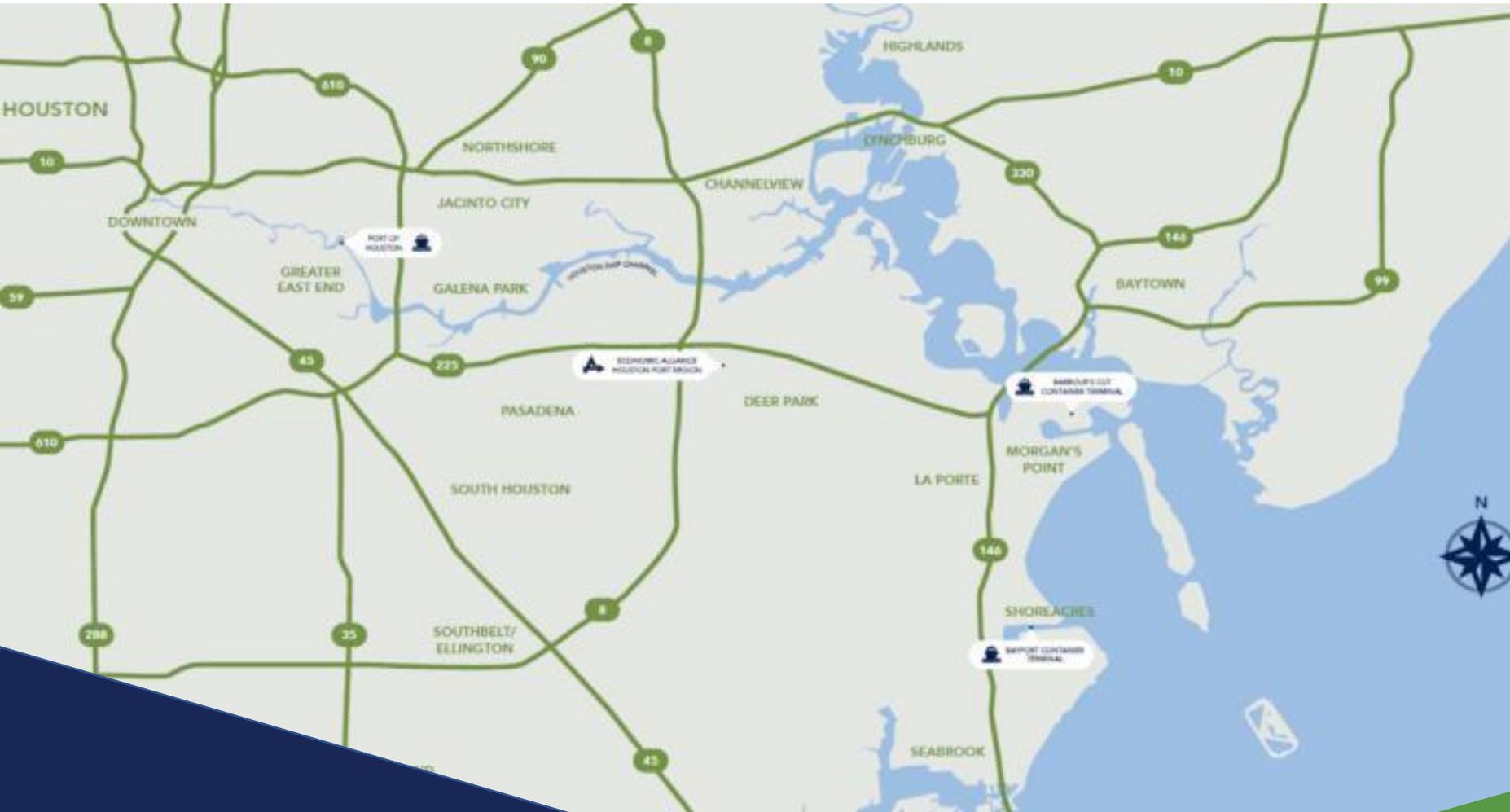
A non-profit organization, created in 1985 whose mission is to ***Grow and market a vibrant regional economy.***



Who We Represent



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, plus

250+ Private Sector **Members**

Houston: the Busiest Port

Houston Annual Barge
Movements:
220,000

Galveston: 840
Texas City: 1,171
Houston: 8,284

4,297

NY/NJ

4,601

LA/LB

10,295

HSC

Photo Credit: Capt. Lou Vest
Data Source: GHPB, Marine Exchange of Southern California,
Maritime Assoc. of Port of New York and New Jersey

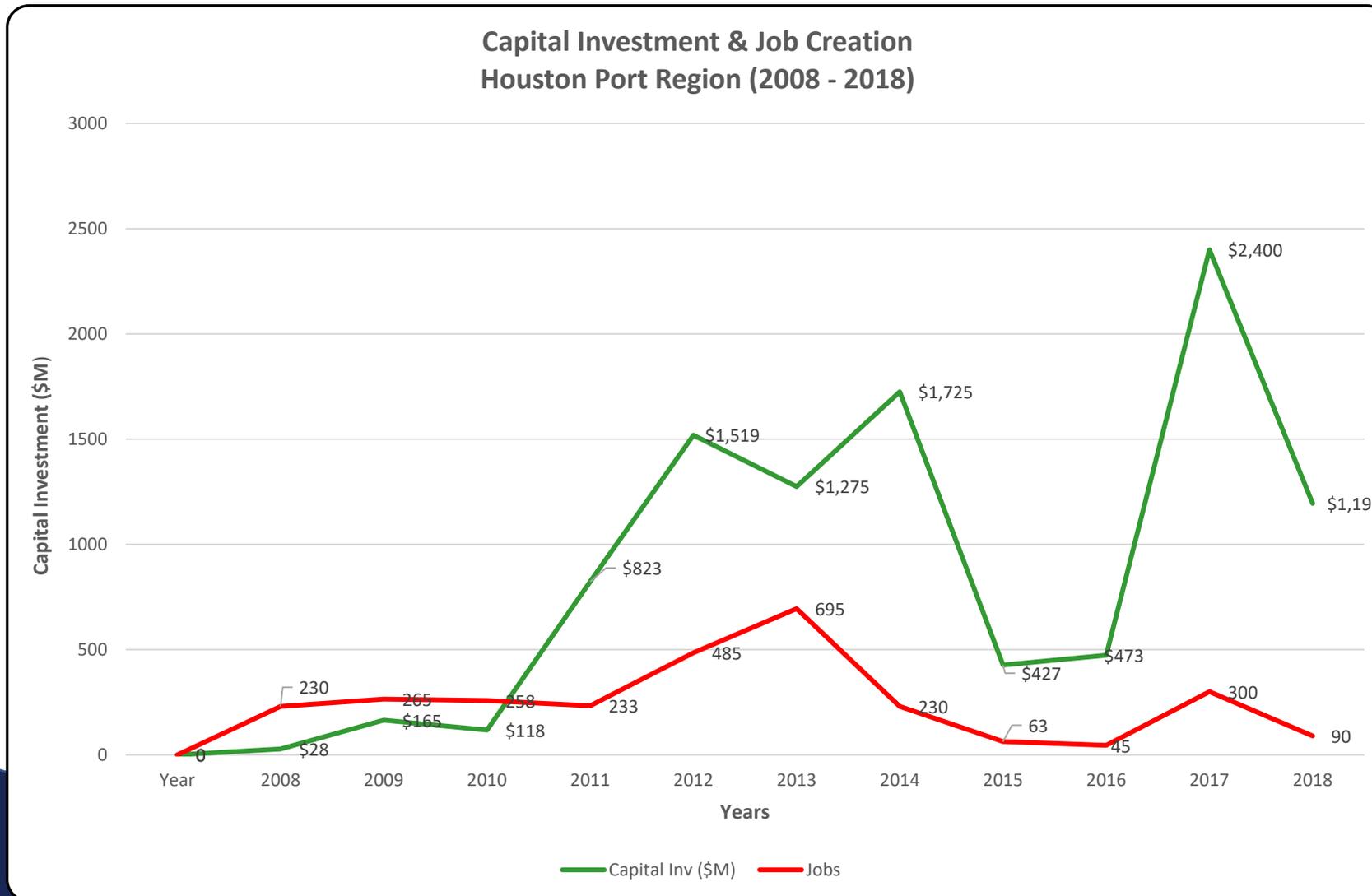


Economic Development

Economic Development



Impact on the Houston Port Region – Historical

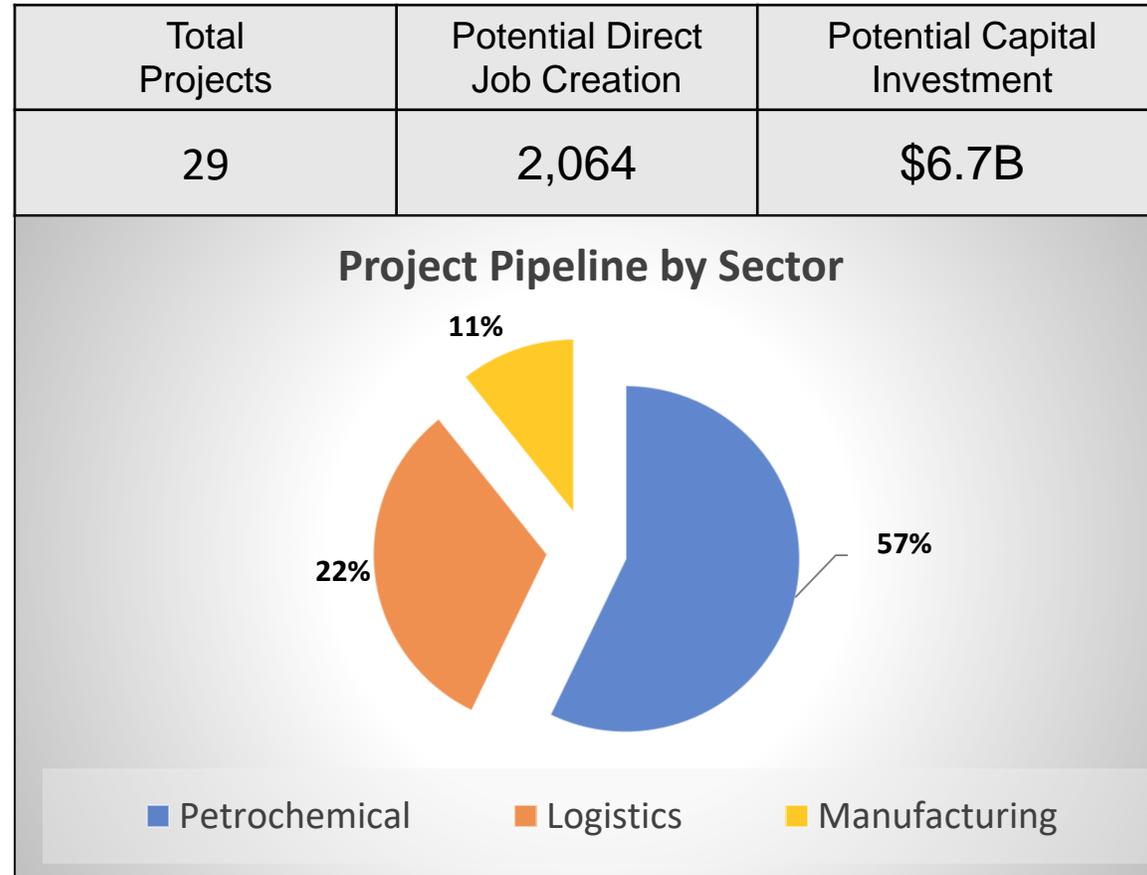


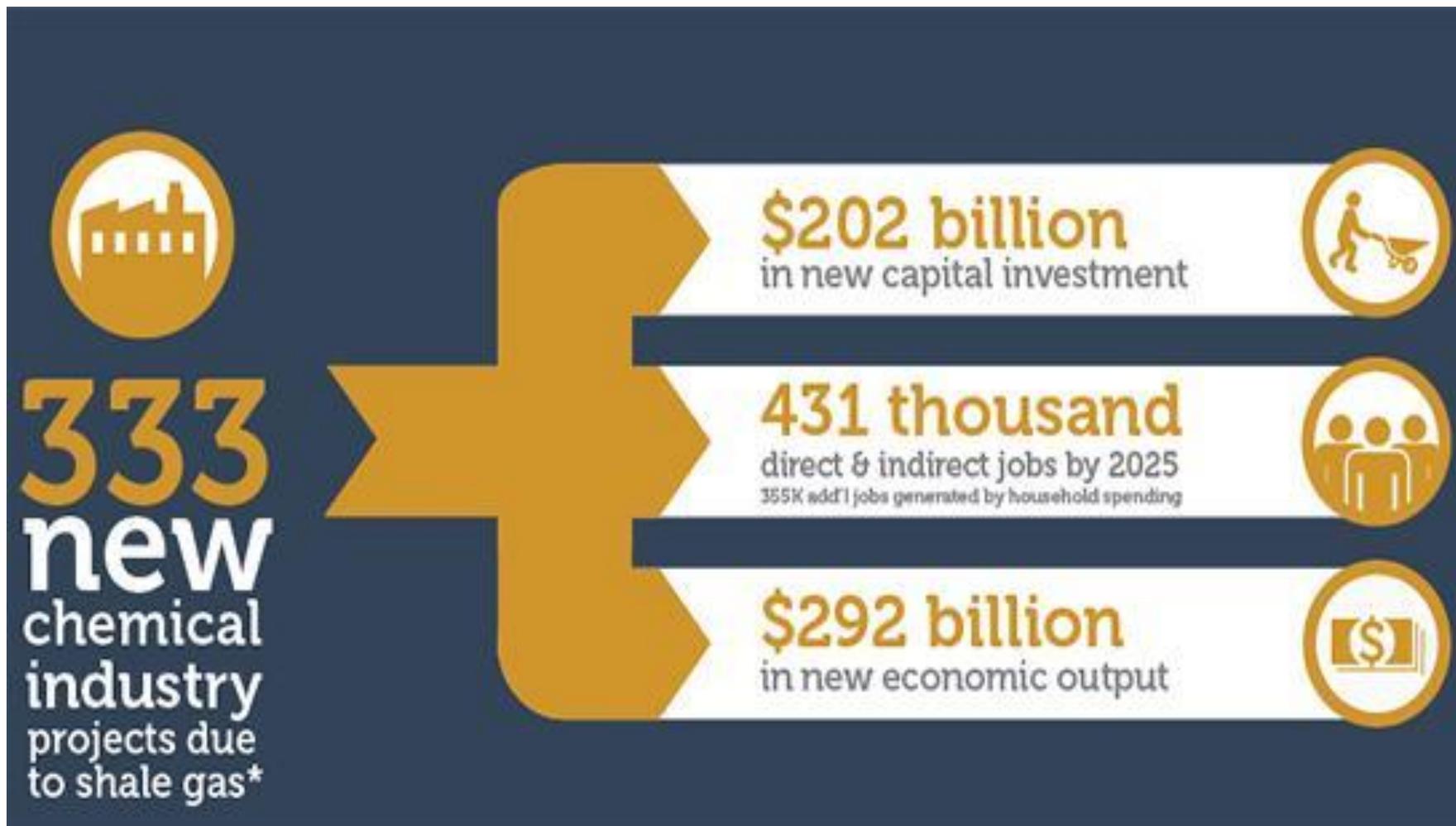
61 "Wins" since 2011:

- \$10 B Capital Investment
- 2,894 Jobs Created
- After 3 decades w/o expansions

Economic Development

Current Project Pipeline Breakdown





>\$60 billion in new investment along the 25 mile stretch of the upper Houston Ship Channel

Economic Development

Why focus on the Petrochemical Industry?

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

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

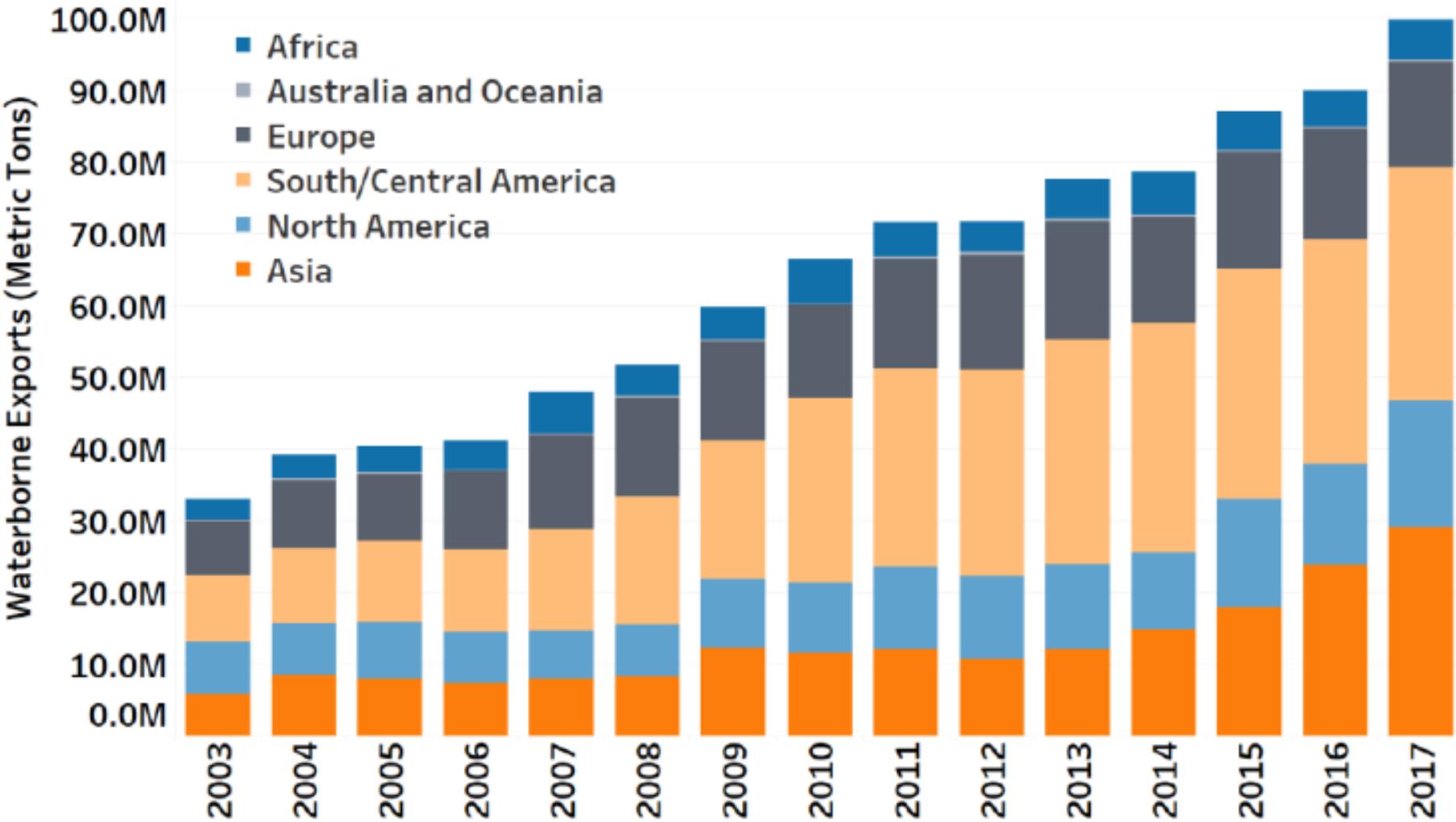




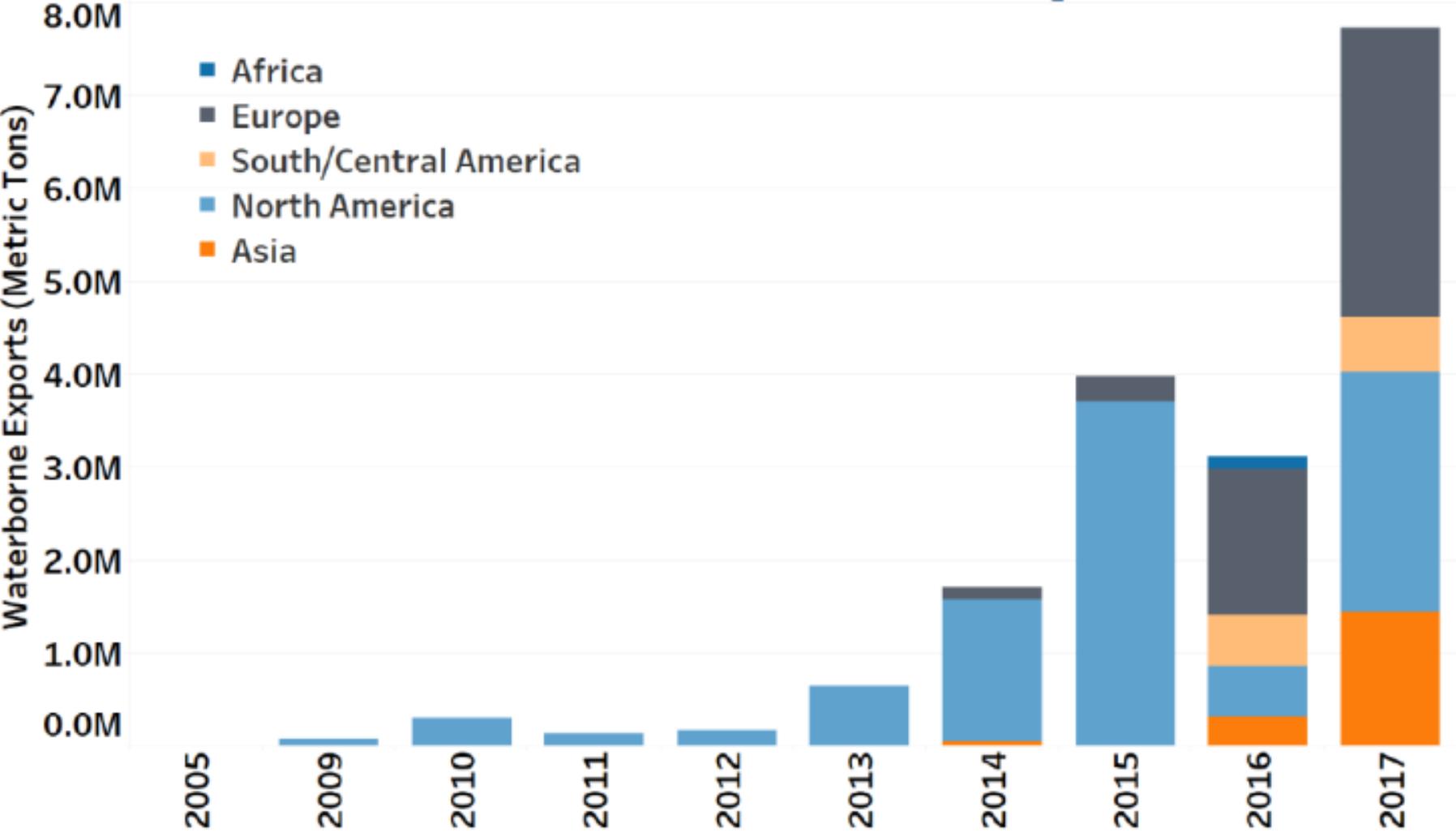
Growth & Infrastructure

"Infrastructure doesn't move at the pace of business"

Houston Total Exports



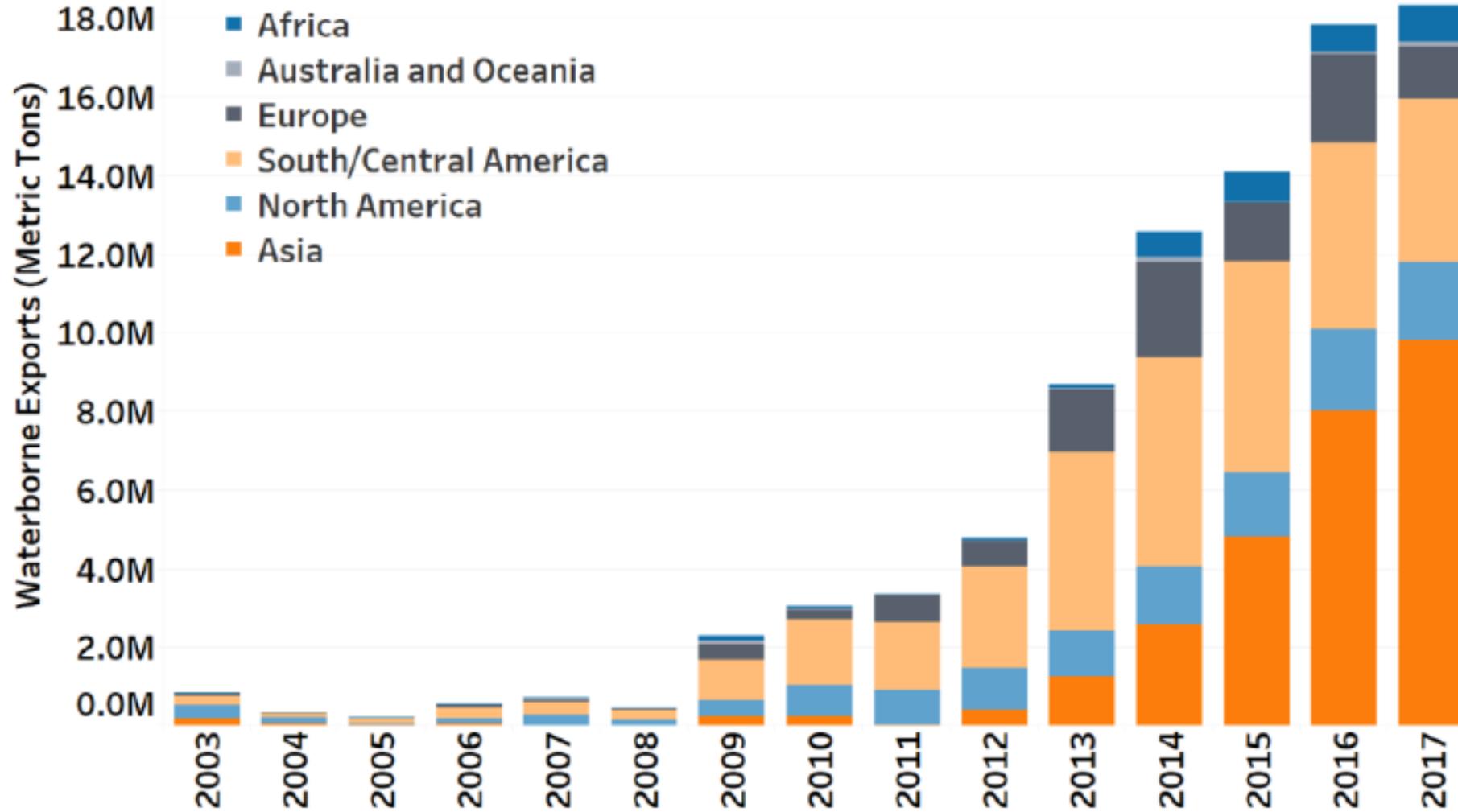
Houston Crude Oil Exports



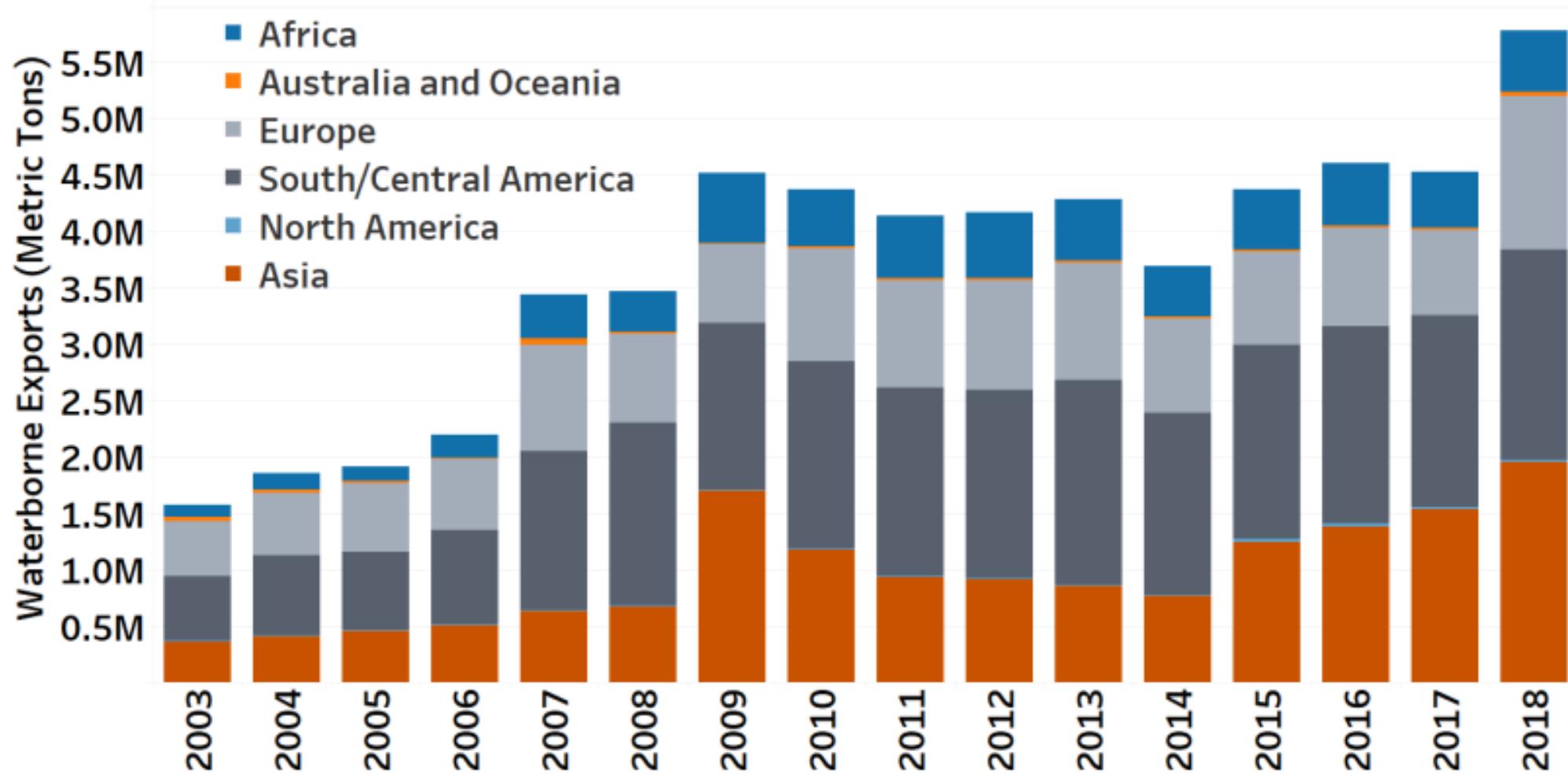
At the end of 2015, the US congress fully liberalized exports of all grades of US crude oil. *McKinsey*



Houston LPG Exports



Houston Plastics Exports 2003-2018



Source: GHPB analysis of U.S. Census data

35% increase in 1 year after a decade of 0% growth

Public Policy - Transportation Taskforce



Committee of Regional Transportation Stakeholders

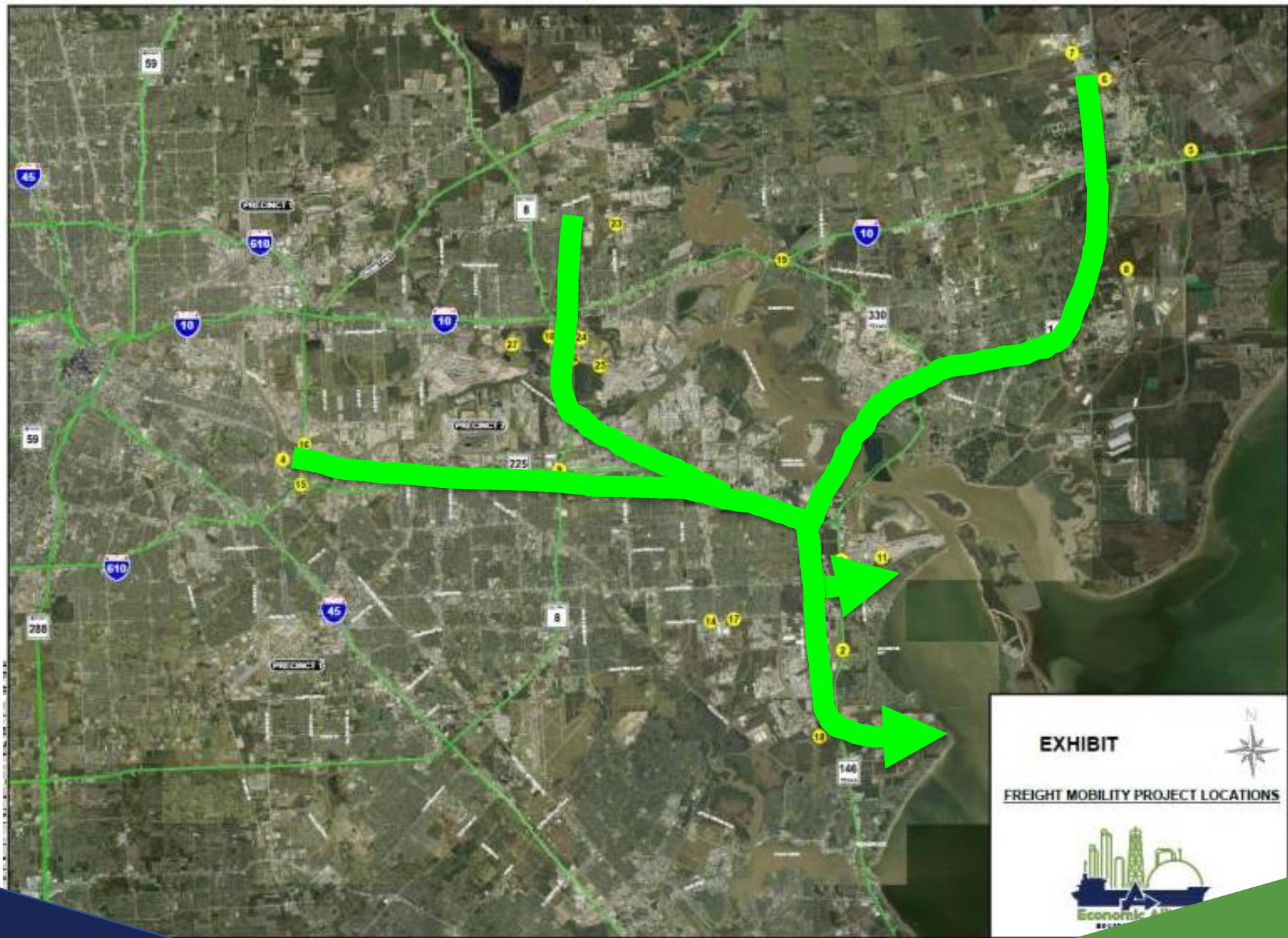
- Regional Mayors
- East Harris County Mfg's Assoc. (130+ plants)
- Port of Houston Authority
- Harris County
- TxDOT
- HGAC
- BayTran

Addressing 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 Pensinsula 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 I10 to Business 146 (Alexander Drive)	H/M	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



EXHIBIT

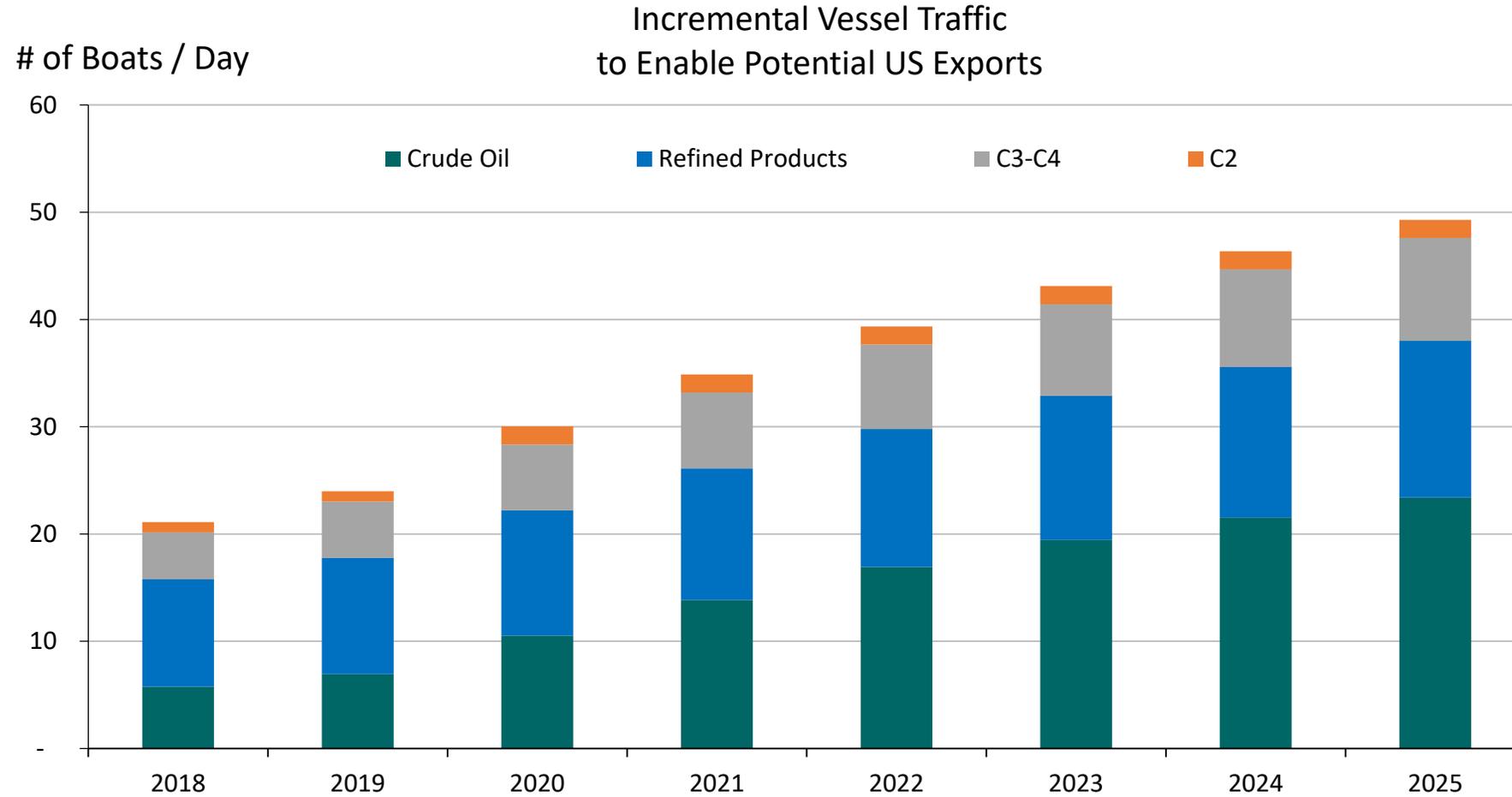
FREIGHT MOBILITY PROJECT LOCATIONS





Infrastructure on the Water

This Volume Growth Would Result in 2.5X Additional Ships For To Support Exports



Source: EPD Fundamentals

Gulf Coast Private Investments Dwarfs Investments by All Other Ports

(Dollars in Billions)

Region	Capital Spend By Ports 2016-2020	Private Sector Port Capital 2016-2020
Great Lakes	\$0.5	\$0.5
North Pacific	\$1.3	\$2.7
North Atlantic	\$3.6	\$1.2
South Pacific	\$4.6	\$3.1
South Atlantic	\$7.6	\$1.8
Gulf Coast	\$5.0	\$122.8
	\$22.6	\$132.1

Source: EPD Fundamentals, American Association of Port Authorities; 2016-2020 Port Planned Infrastructure Survey

While most port's capital is driven by imports of foreign-made products, the Gulf Coast is driven by private investments supporting the U.S. Energy Revolution.

What can we do together to solve this dilemma,
continue growth in the national economy and
“Create Value for the Nation”?

- Move fast and Move together!
- Recognizing the position the Corps is in (largest works program in the nation and annual issues with funding)
- The Partners are ready

It's time to drop the stone in the sling and let's run at the giant –
Together!



Thank You

www.allianceportregion.com