

# Transformative Power of Ports on Global Dairy Trade

2:00 – 3:00 p.m.



**Ricardo Arias**  
trade development manager  
for the Port of Houston

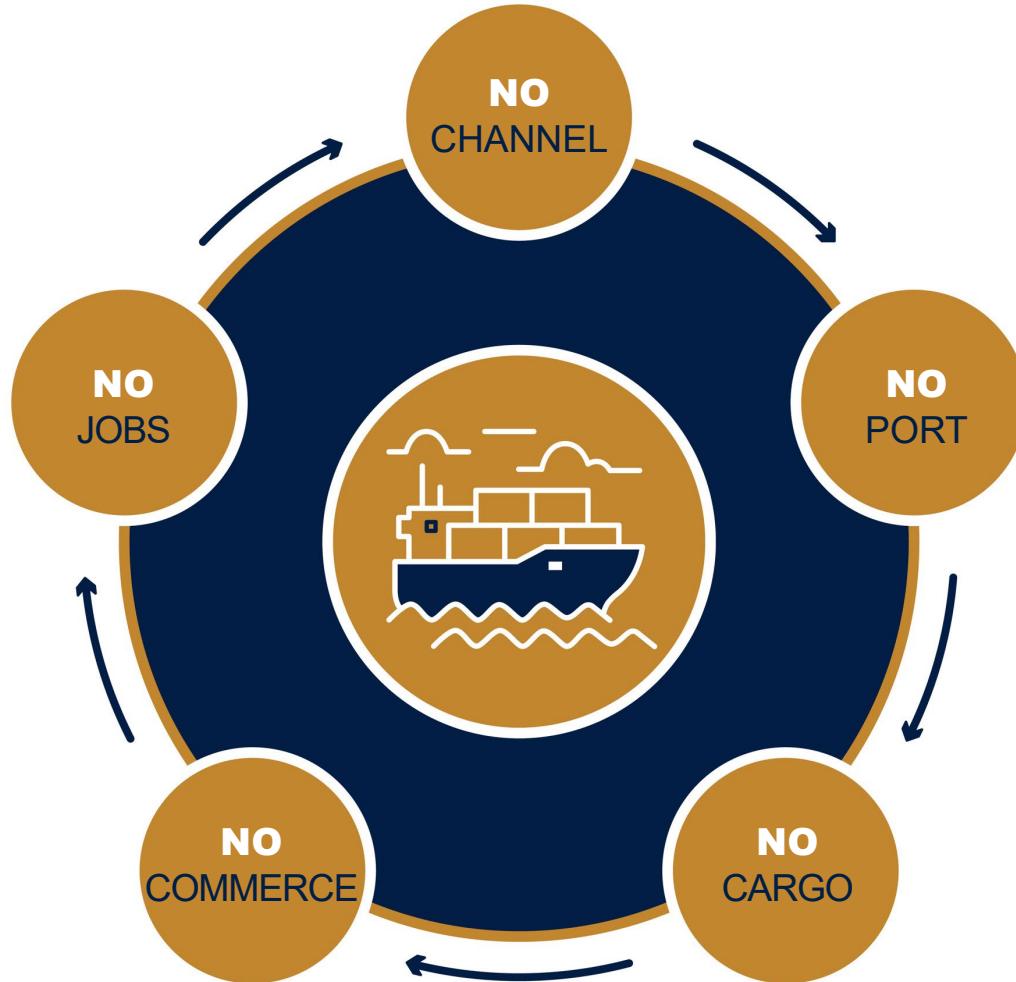
# LOOKING AHEAD

**PORT HOUSTON**



# ENGINE OF ECONOMIC PROSPERITY

The Houston Ship  
Channel is a **crucial**  
**economic engine**



# HOUSTON SHIP CHANNEL, A FEDERAL WATERWAY



**1.54  
MILLION**

JOBS IN TEXAS



**3.37  
MILLION**

JOBS NATIONWIDE



**\$439  
BILLION**

ECONOMIC IMPACT  
IN TEXAS



**\$906  
BILLION**

ECONOMIC IMPACT  
ACROSS THE U.S.

# HOUSTON RANKS FIRST

**#1**

EXPORT  
STATE

TEXAS

**#1**

WATERBORNE  
TONNAGE

THE HOUSTON SHIP CHANNEL

**#1**

EXPORT  
REGION

HOUSTON

# SUPER PORT COMPLEX ON A SCALE LIKE NO OTHER

## #1 PORT IN THE U.S.

FOR WATERBORNE TONNAGE

MORE THAN  
**152M**  
**CONSUMERS**  
WITHIN 1,000 MILES



HANDLES  
**73% OF**  
**CONTAINERS**  
IN U.S. GULF OF MEXICO

## #1 IN STEEL

IN THE U.S.



## #5 CONTAINER PORT IN THE U.S.



## BUSIEST U.S. WATERWAY

MORE THAN  
**266M**  
**TOTAL**  
**TONNAGE**

MORE THAN  
**8,300 DEEP DRAFT**  
**SHIP CALLS**  
ANNUALLY

MORE THAN  
**200,000 BARGE**  
**TRANSITS**  
ANNUALLY

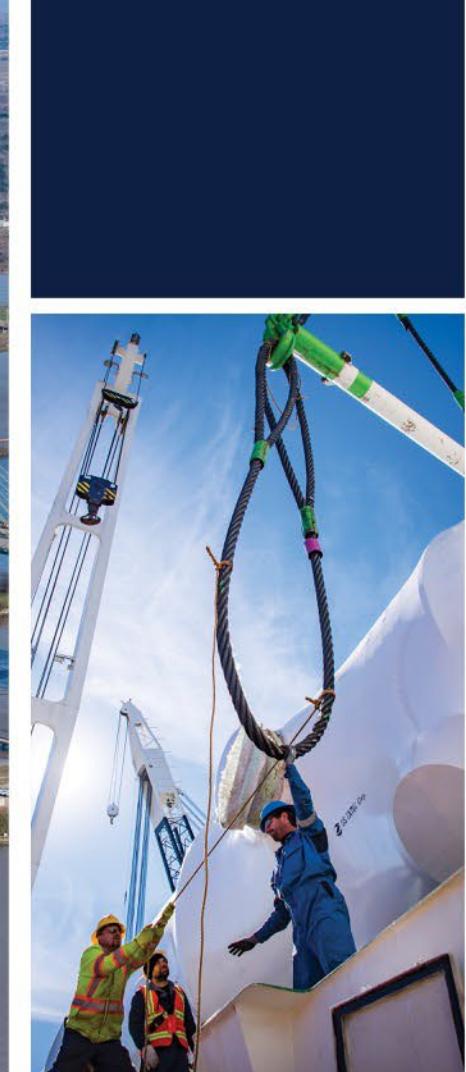
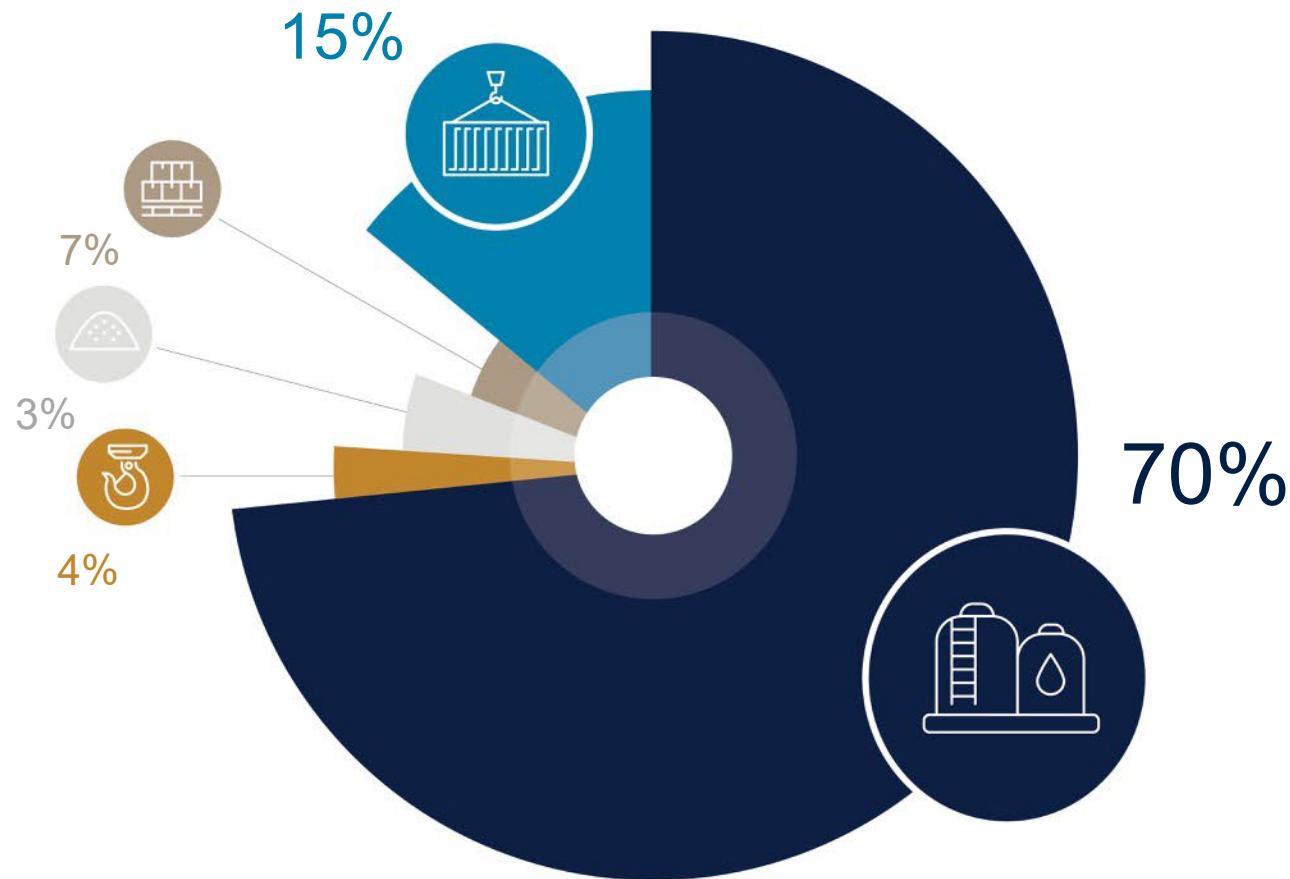
# THE ENERGY CAPITAL OF THE WORLD

- The Houston Ship Channel is home to the largest **petrochemical** complex in the U.S.
- Houston also has the largest **energy pipeline and storage** network in the U.S.
- **500 million barrels** of liquid storage along the Houston Ship Channel
- About **70% of cargo** on Houston Ship Channel is liquid bulk



# HOUSTON SHIP CHANNEL

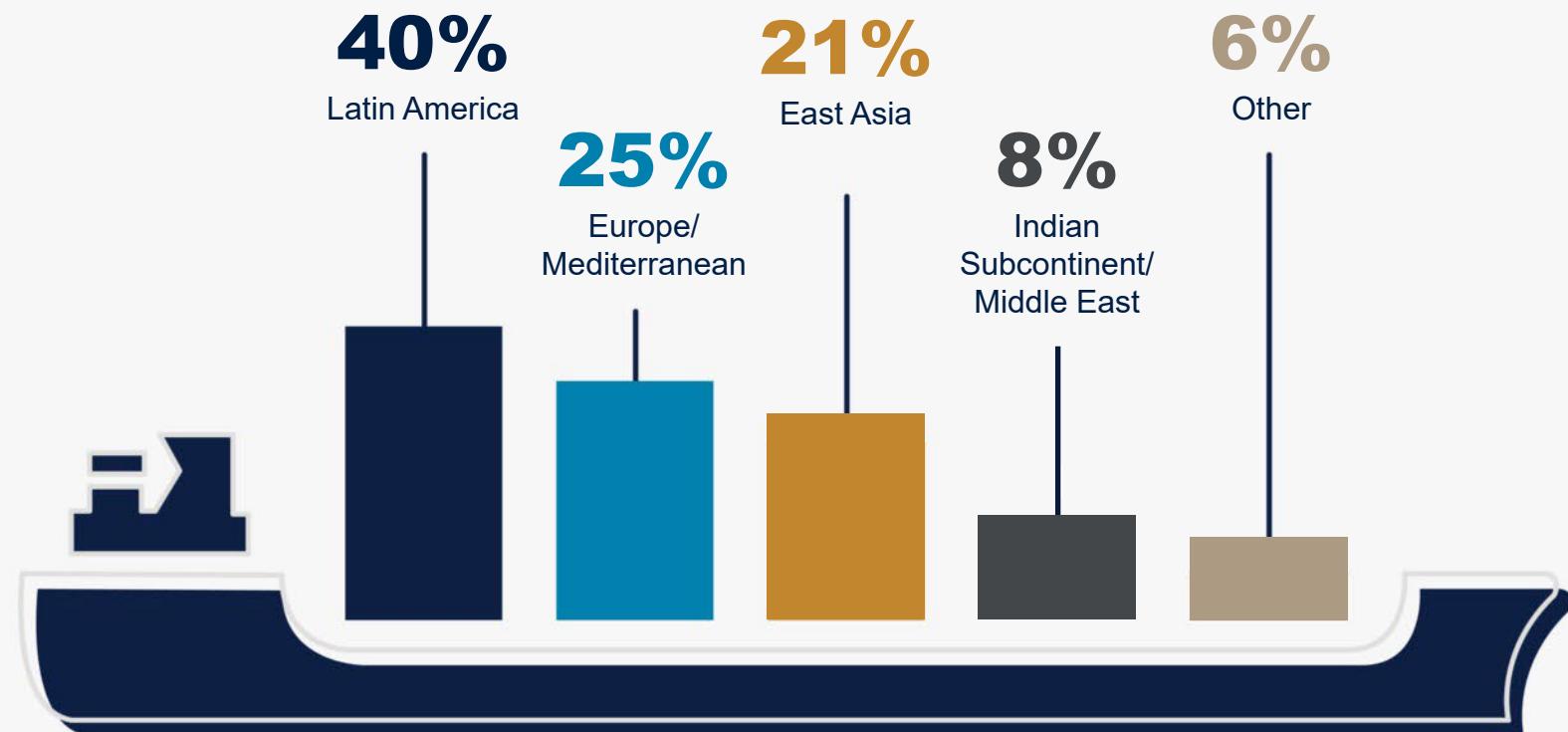
CARGO SECTORS 2023 (YTD NOV)



- Liquid Bulk
- Containerized
- Project Cargo
- Dry Bulk
- General Cargo

# HOUSTON SHIP CHANNEL

WHERE IS THE CARGO COMING FROM OR GOING TO?



Note: Excludes regions not listed in PIERS

Source: Journal of Commerce (PIERS), PH Research & Forecasting



# WHO IS SHIPPING?

**TOTAL FREIGHT: FULL YEAR 2022**

## Top 10 HSC Importers

PMI NorteAmerica  
ExxonMobil  
Houston Cement Company  
Chevron  
Sesco Cement  
Shell  
Motiva  
Circon Environmental  
Valero  
Pusan

## Top 10 HSC Exporters

ExxonMobil  
Enterprise Products  
Trafigura  
BP  
Chevron  
Equinor  
Shell  
Valero  
Petrodec  
Phillips Sixty-Six

Note: Excludes companies not listed in PIERS  
Source: Journal of Commerce (PIERS), PH Research & Forecasting



# WHAT IS COMING AND GOING?

**TOTAL FREIGHT: FULL YEAR 2022**

<b>HSC Import Commodities</b>	<b>MTONS</b>
Chemicals & Minerals	32,086,892
Steel & Metals	8,156,972
Hardware & Construction Materials	8,110,169
Machinery, Appliances And Electronics	3,384,522
Food & Drink	3,536,500
Retail Consumer Goods	1,826,496
Resins & Plastics	1,628,875
Automotive	1,163,524
Furniture	1,093,237
Apparel & Accessories	461,331
Fabrics including Raw Cotton	286,223
Other	206,790

<b>HSC Export Commodities</b>	<b>MTONS</b>
Chemicals & Minerals	106,729,223
Resins & Plastics	6,387,679
Food & Drink	5,571,689
Steel & Metals	1,291,498
Apparel & Accessories	852,890
Automotive	843,214
Machinery, Appliances And Electronics	828,004
Fabrics including Raw Cotton	758,870
Hardware & Construction Materials	339,749
Retail Consumer Goods	247,324
Furniture	71,163
Other	187,123

Note: Total Houston Ship Channel (PH + Private)  
Source: Journal of Commerce (PIERS), PH Research & Forecasting



# PORt COMMISSION



**Ric Campo**

Chairman of the Port Commission



**Dean E. Corgey**  
Commissioner



**Clyde Fitzgerald**  
Commissioner



**Stephen H. DonCarlos**  
Commissioner



**Wendy Montoya Cloonan**  
Commissioner



**Cheryl D. Creuzot**  
Commissioner



**Alan Robb**  
Commissioner



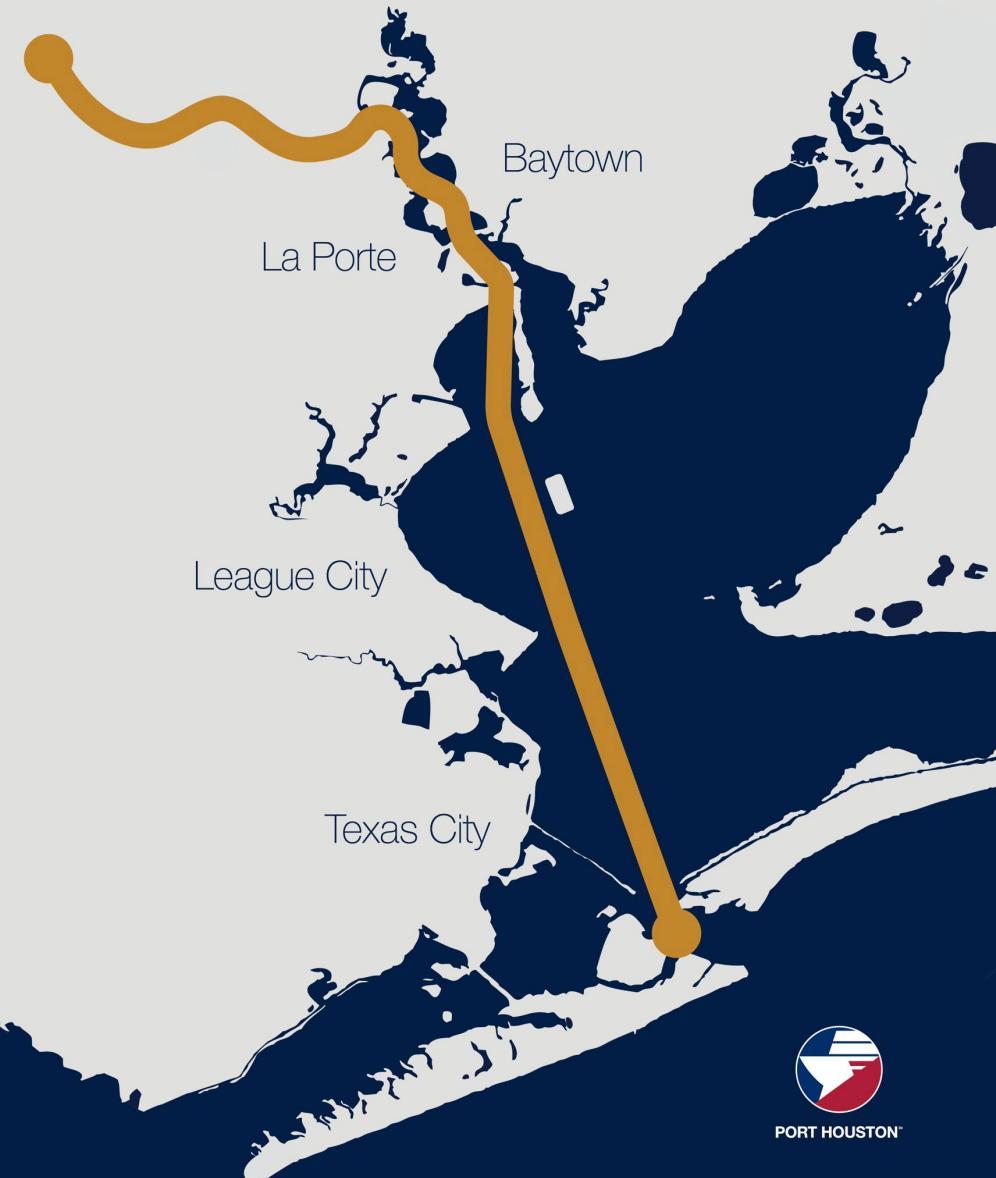
PORT HOUSTON®

# WHO WE ARE

We manage eight public terminals — including two container facilities we operate and six others for which we're the landlord

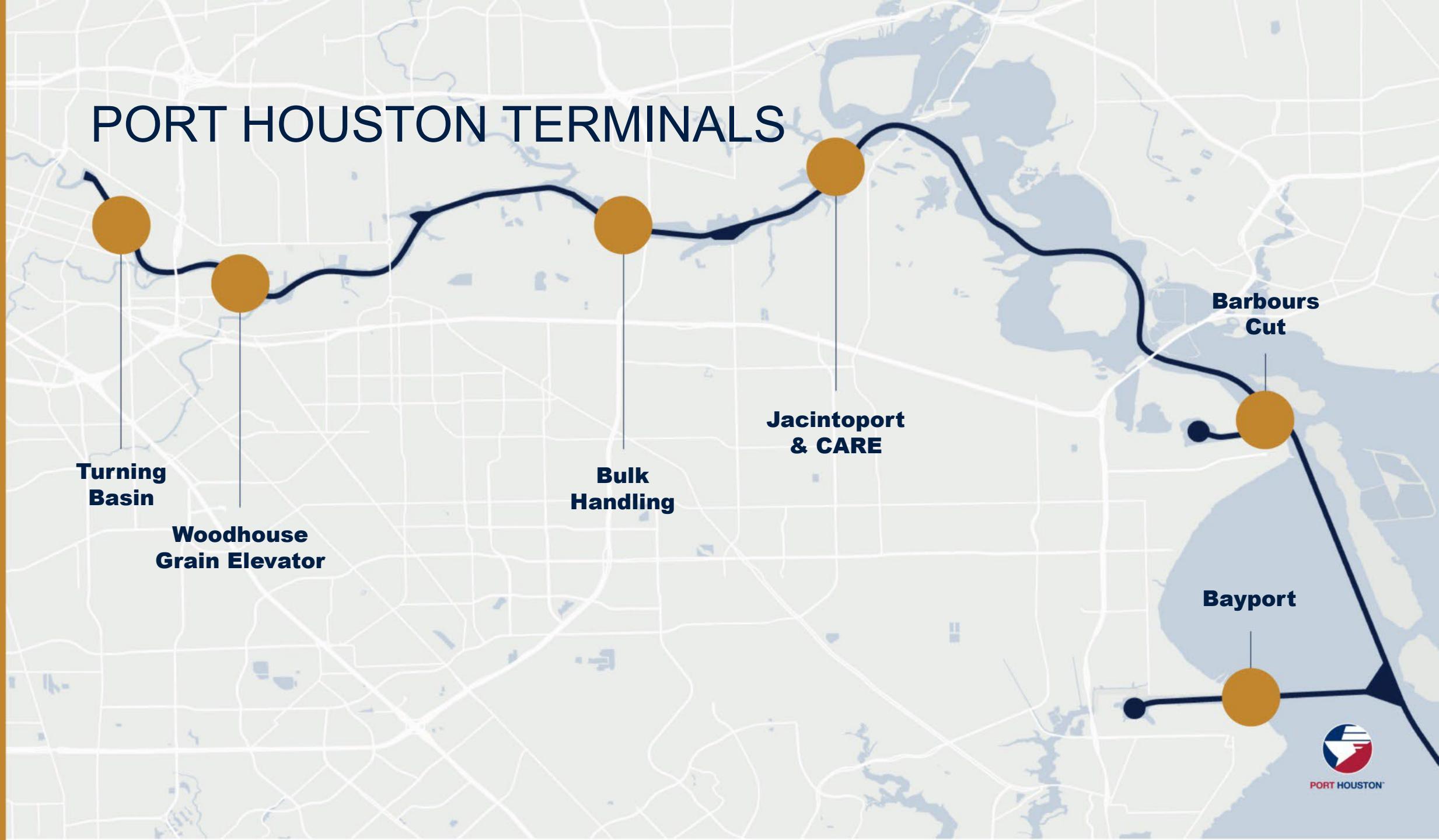
As the advocate and a strategic leader of the Houston Ship Channel, we support the more than 200 facilities and the neighboring communities along it by working with the federal government

We facilitate vital commerce through the port that helps keep the local and state economy moving



PORT HOUSTON™

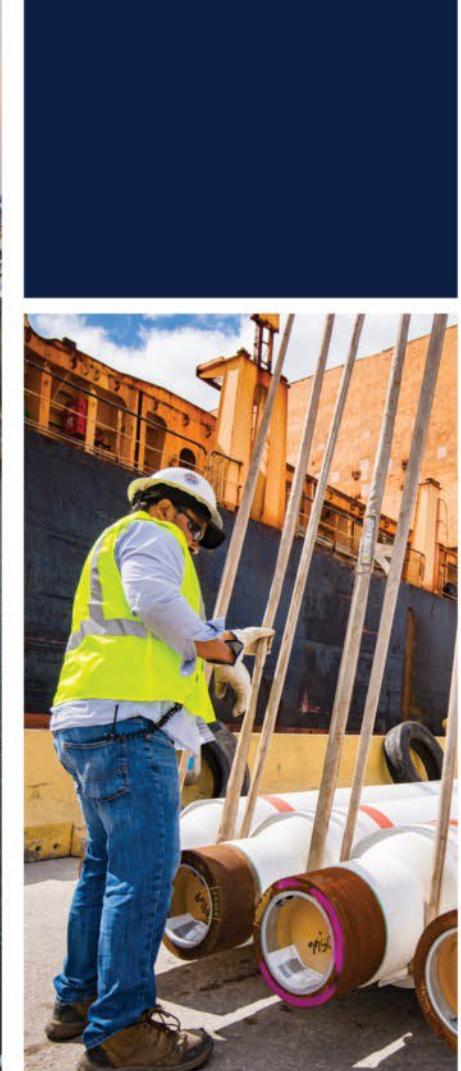
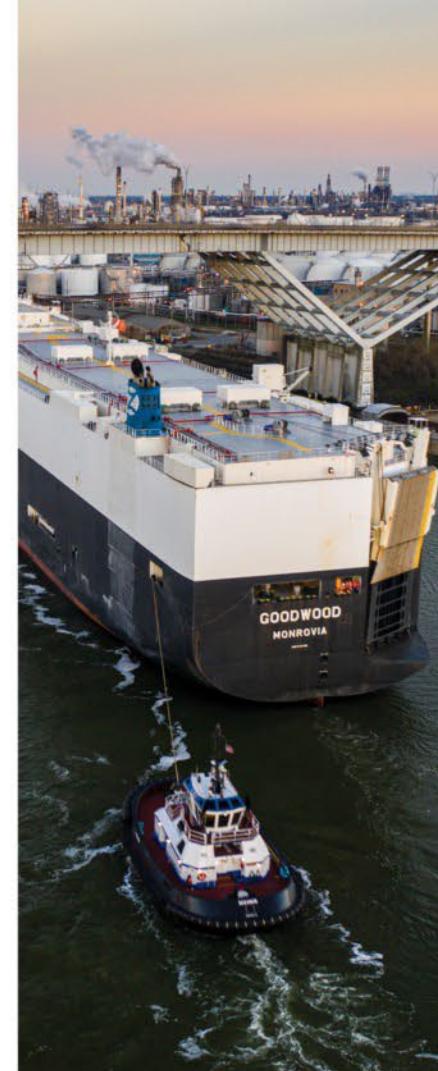
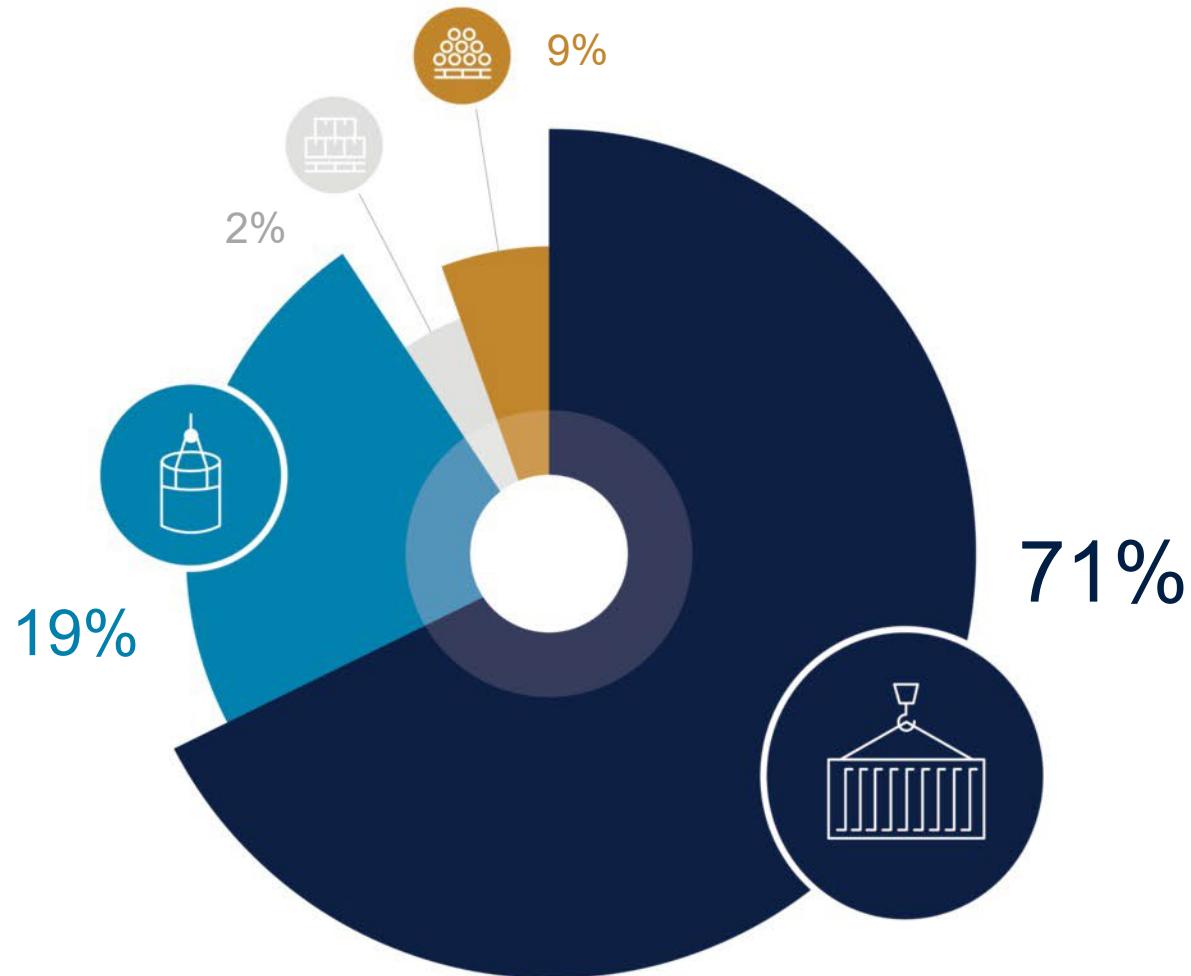
# PORT HOUSTON TERMINALS



PORT HOUSTON™

# PORT HOUSTON

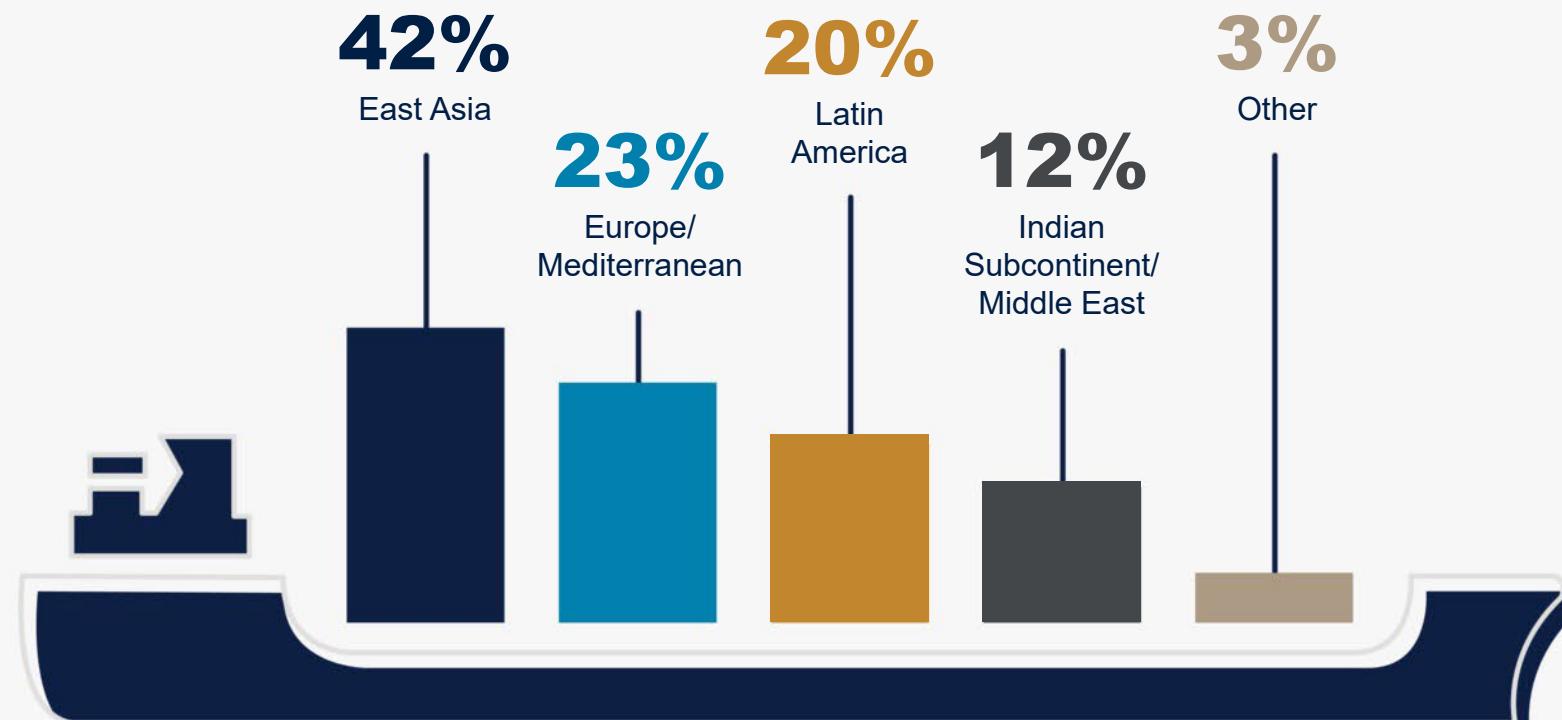
CARGO SECTORS 2023



- Containerized
- Bulk Cargo
- General Cargo (Steel)
- General Cargo (Other)

# PORT HOUSTON

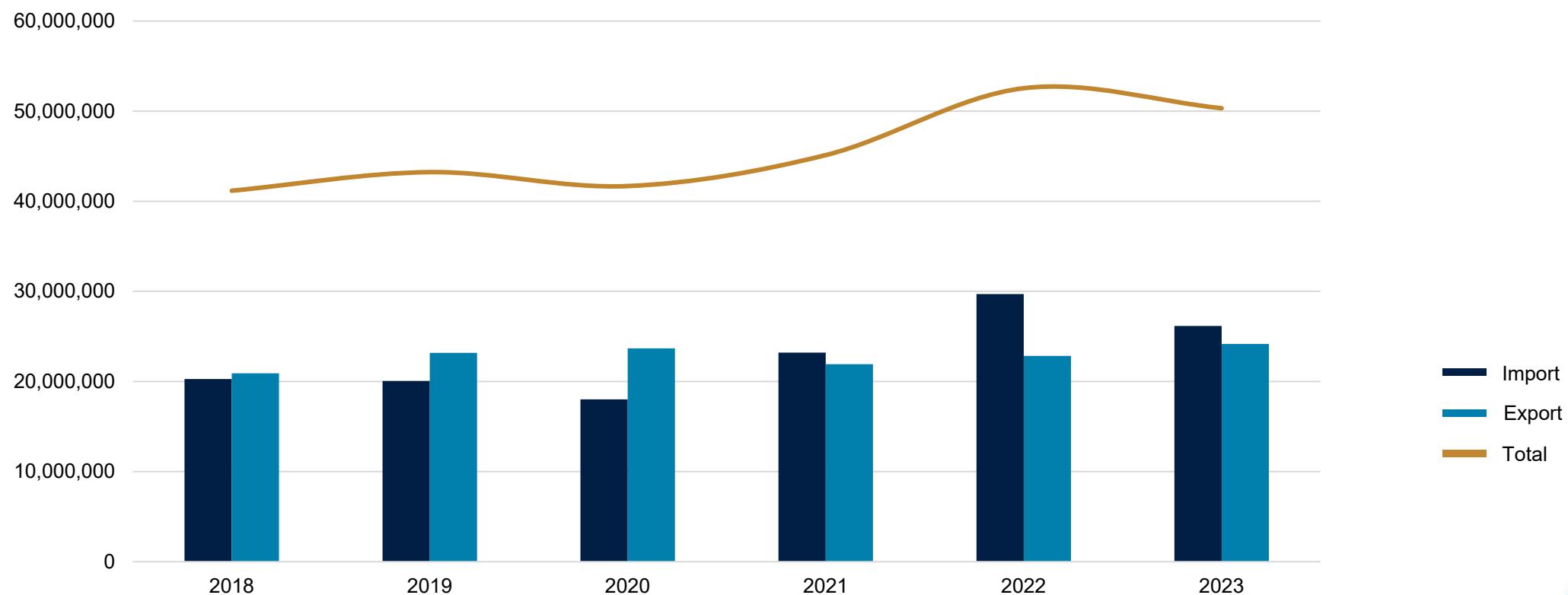
WHERE ARE THE CONTAINERS COMING FROM OR GOING TO?



# PORT HOUSTON

TONNAGE GROWTH | 2016-2023

PH Tonnage excluding BIC (Short Tons)



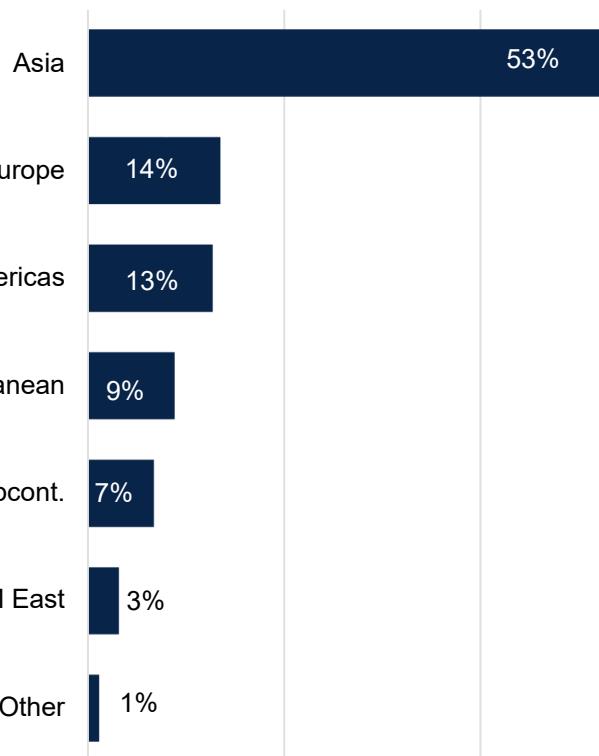
Note: 1 Short Ton Equals 0.907 Metric Ton  
Source: PH Accounting, PH Research & Forecasting



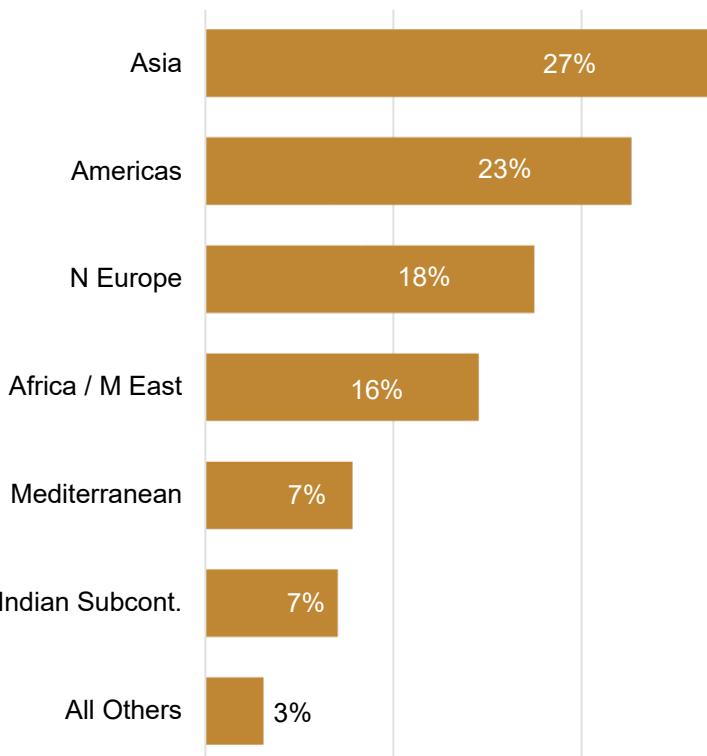
# CONTAINER TRADE SHARE

2022

## Imports by Trade Region



## Exports by Trade Region



Note: Totals DO NOT include empty containers

Source: Journal of Commerce (PIERS), PH Research & Forecasting



# TOP CONTAINER CARRIERS

JANUARY–DECEMBER 2022

Top 10 Carriers	Exports	Imports	Total TEU	Percentage
MSC	256,572	459,840	716,413	23.2%
Maersk	206,962	312,769	519,731	16.8%
CMA-CGM	166,523	257,869	424,393	13.7%
Hapag Lloyd	179,046	222,365	401,411	13.0%
ONE	48,483	120,602	169,085	5.5%
COSCO	52,909	99,904	152,813	4.9%
Evergreen	33,379	99,266	132,645	4.3%
Hamburg Sud	57,210	51,592	108,802	3.5%
Seaboard Marine	49,711	35,259	84,970	2.7%
ZIM	22,462	61,819	84,281	2.7%

Note: Totals DO NOT include empty containers

Source: Journal of Commerce (PIERS), PH Research & Forecasting



# WHO IS SHIPPING?

CONTAINERIZED FREIGHT: FULL YEAR 2022

## Top 10 Port Houston Importers

LG Electronics

Walmart

Ikea

Rooms To Go

Heineken

Steve Silver

Crown Cork & Seal

Tramontina

Continental Tire

Plycem

## Top 10 Port Houston Exporters

ExxonMobil

Shintech

Vinmar

Montachem

Allenberg Cotton

Muehlstein

Olam Agriculture

Fondomonte Arizona

World Food Programme

Bamberger Polymers

Note: Totals DO NOT include empty containers; Excludes companies not listed in PIERS, e.g., Walmart  
Source: Journal of Commerce (PIERS), PH Research & Forecasting



# WHAT COMES IN A CONTAINER?

CONTAINERIZED FREIGHT: FULL YEAR 2022

Port Houston Import Commodities	TEU	Port Houston Export Commodities	TEU
Machinery, Appliances & Electronics	307,754	Resins & Plastics	483,541
Retail Consumer Goods	272,357	Chemicals & Minerals	239,229
Hardware & Construction Materials	244,145	Automotive	104,155
Food & Drink	219,371	Food & Drink	73,564
Furniture	207,866	Apparel & Accessories	64,168
Resins & Plastics	139,967	Machinery, Appliances & Electronics	61,734
Steel & Metals	131,023	Steel & Metals	55,726
Automotive	124,241	Fabrics including Raw Cotton	53,786
Chemicals & Minerals	108,970	Retail Consumer Goods	24,262
Apparel & Accessories	80,592	Hardware & Construction Materials	15,692
Fabrics including Raw Cotton	35,034	Furniture	5,940
Other	26,086	Other	12,502

Note: Totals DO NOT include empty containers

Source: Journal of Commerce (PIERS), PH Research & Forecasting



# Dairy Products and Eggs Trade - Houston

**Full Year 2023**

# WHO IS SHIPPING?

Dairy Products and Eggs: Full Year 2023

## Top 10 Importers

Batory De Mexico S De R L De C V  
Honey Holding  
Lineage Logistics  
Sunland Trading  
Natural Honey Importers  
Mexalink  
Unimacts Global  
Smitty Bee Honey  
Coco Lopez  
Fonterra

## Top 10 Exporters

Hoogwelt  
Leprino Foods Dairy Products  
Dairy Farmers Of America  
Parker Migliorini International  
Dairy America  
Sysco International Food  
Pure Dairy  
Dairy Farmers Of America  
Apimiel  
Sams Club

Note: Excludes companies not listed in PIERS

Source: Journal of Commerce (PIERS) HS code 04, PH Research & Forecasting



# HOUSTON TRADE VOLUME

**Dairy Products and Eggs: Full Year 2023**

## Houston Full Year 2023

**Volume in TEU**

Commodity	Import	Export	Total
Dairy Products/Eggs	5,433	2,288	7,722

Source: Journal of Commerce (PIERS) HS code 04

# WHAT IS THE TYPE OF DIARY PRODUCTS?

CONTAINERIZED FREIGHT: Full Year 2023

## Types of Dairy Products

- Cheese And Curd
- Milk And Cream, Concentrated Or Sweetened
- Butter And Other Fats And Oils Derived From Milk
- Whey & Milk Products Nesoi, Flavored Etc. Or Not
- Milk And Cream, Not Concentrated Or Sweetened
- Buttermilk, Yogurt, Kephir Etc, Flavored Etc Or Not
- Birds' Eggs, Not In Shell & Yolks, Fresh, Dry, Etc
- Birds' Eggs, In The Shell, Fresh, Preserv Or Cookd
- Honey, Natural

Source: Journal of Commerce (PIERS) HS code 04, PH Research & Forecasting



# EXPANDING THE CHANNEL

## **Project 11**

- Port Houston's most ambitious expansion initiative yet

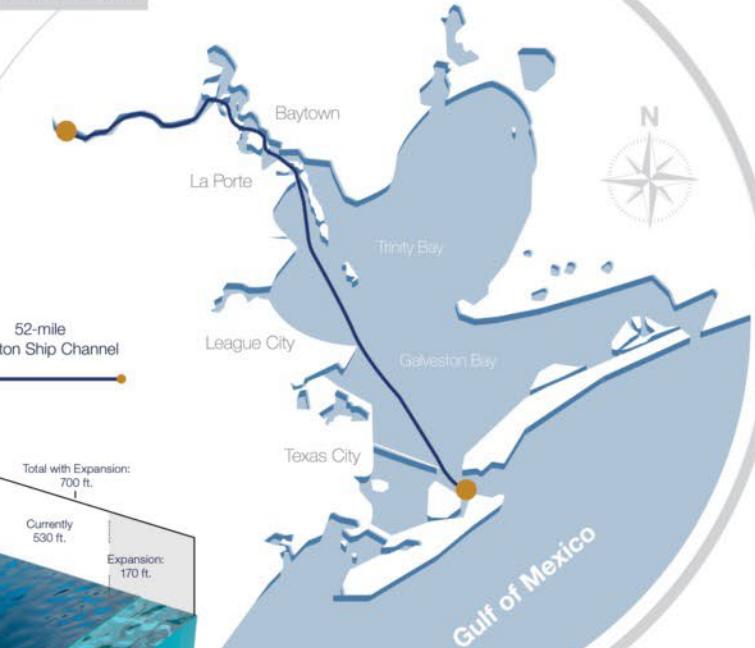
## **The goal**

- To widen much of the federal channel from 530 feet to 700 feet and make additional enhancements

## **\$1 billion**

- Public/private partnership project

Houston



**28%**  
increase in avg.  
LPG vessel length  
from 2007 to 2018

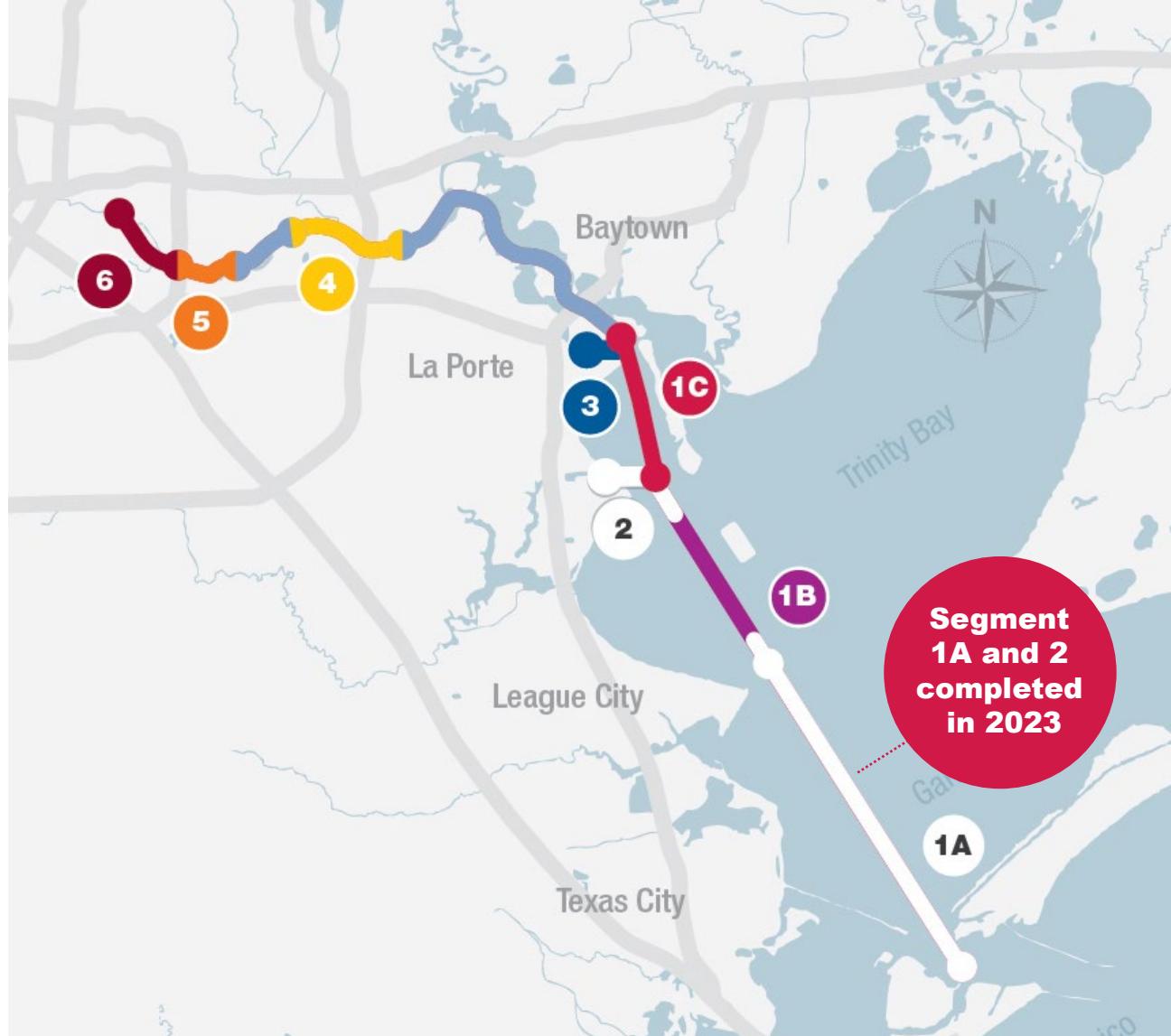
**20%**  
increase in avg.  
container ship length  
from 2006 to 2018

Visit: [www.expandthehoustonshipchannel.com](http://www.expandthehoustonshipchannel.com)

# PROJECT 11— WHERE WE ARE

- In Q1 2023 Segment 1A (Bolivar to Redfish) and in Q4 2023 Segment 2 (Bayport Ship Channel) were completed, on schedule and on budget
- Work on the remaining Galveston Bay segments is currently underway by Weeks Marine and Curtin Maritime

By late 2024, more than 27 miles of the Galveston Bay area (**Segments 1A, 1B, 1C, and 2**) are expected to be fully completed.



Visit: [www.expandthehoustonshipchannel.com](http://www.expandthehoustonshipchannel.com)

# BAYPORT CONTAINER TERMINAL



**5-yr  
Capital  
Investment  
(2024 - 2028)**

**\$1.3  
BILLION**

	<b>Current</b>	<b>At Build-Out</b>
Acres (ha)	392 acres (158 ha)	510 acres (216 ha)
Berth	5	9
Waterfront ft (m)	4,000 ft (1,219 m)	+/- 10,500 ft (2,134 m)
Terminal Capacity	2.3M TEU	4.5M TEU
Equipment (cranes)	15 STS Cranes	30 STS Cranes

# BAYPORT

FUTURE PROJECTS



# BARBOURS CUT CONTAINER TERMINAL



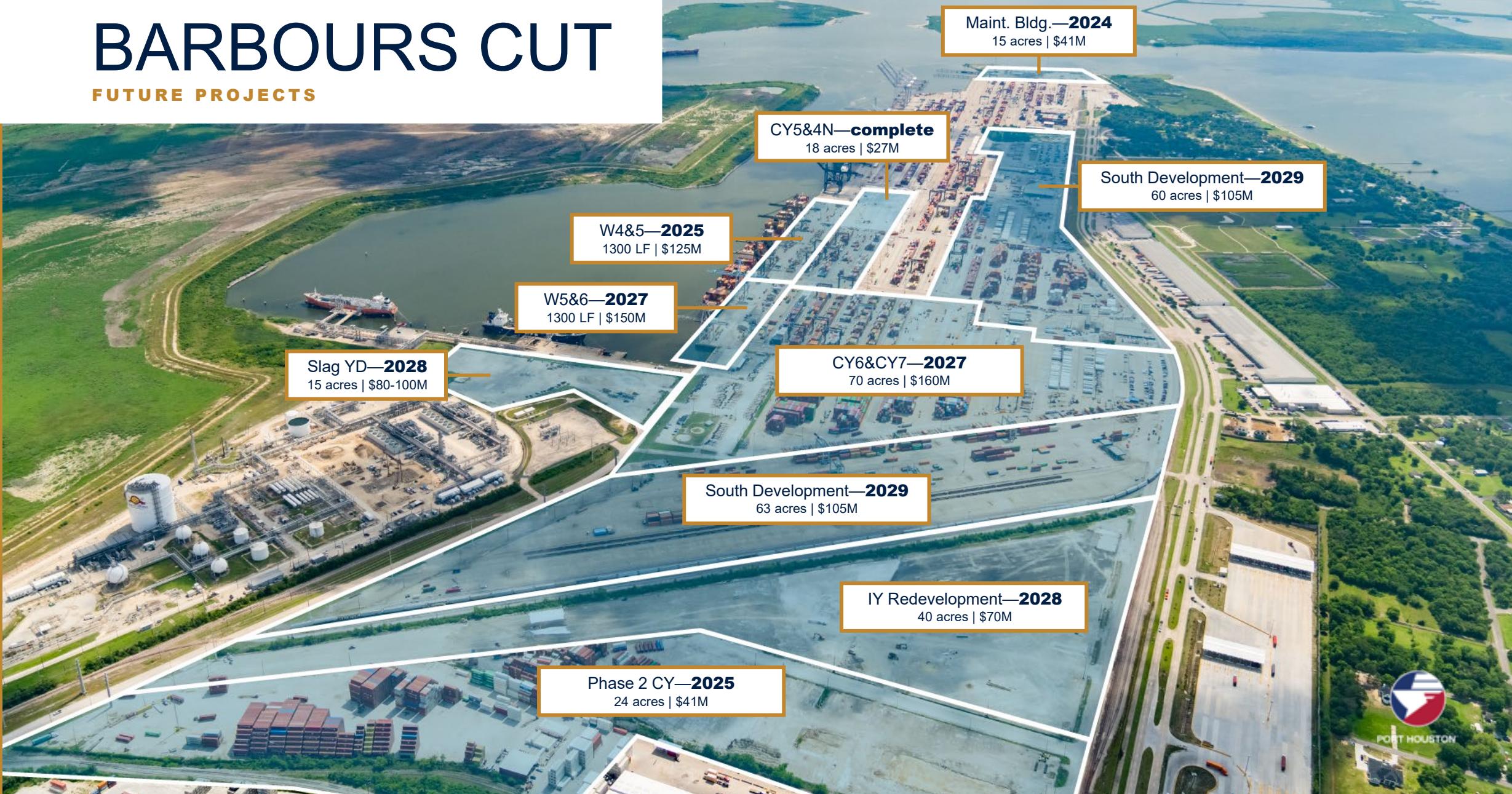
**5-yr  
Capital  
Investment  
(2024 - 2028)**

**\$705  
MILLION**

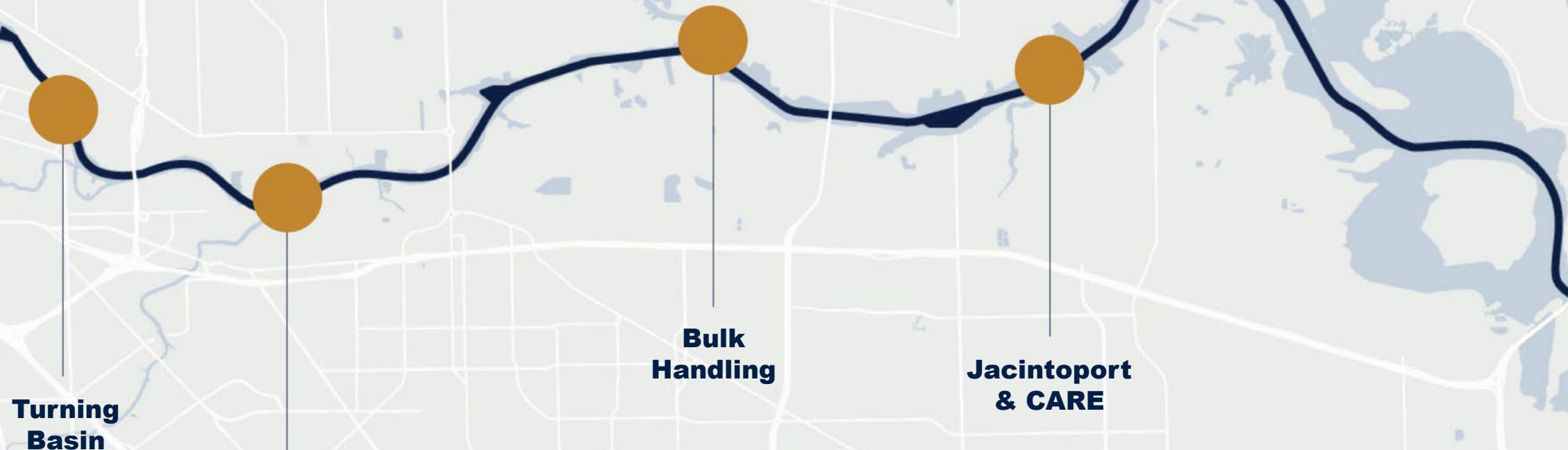
	<b>Current</b>	<b>At Build-Out</b>
Acres (ha)	390 acres (158 ha)	450 acres (158 ha)
Berth	6	6
Waterfront ft (m)	6,000 ft (1,829 m)	6,000 ft (1,829 m)
Terminal Capacity	1.8M TEU	2.6M TEU
Equipment (cranes)	14 STS Cranes	21 STS Cranes

# BARBOURS CUT

## FUTURE PROJECTS



# BREAKBULK TERMINALS



# JACINTOPORT

OPERATED BY JACINTOPORT INTL (SEABOARD MARINE)

- 3 cargo wharves **1,836 ft.**
- **Spiralveyor** cargo handling
- **400 tons** of bagged cargo/hr.
- **437K sq. ft.** warehouse space
- **FTZ designation**
- **On-site** product bagging
- **Direct** on-dock rail access



# THANK YOU

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 Port Houston

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