

Transformative Power of Ports on Global Dairy Trade

2:00 – 3:00 p.m.



Ricardo Arias

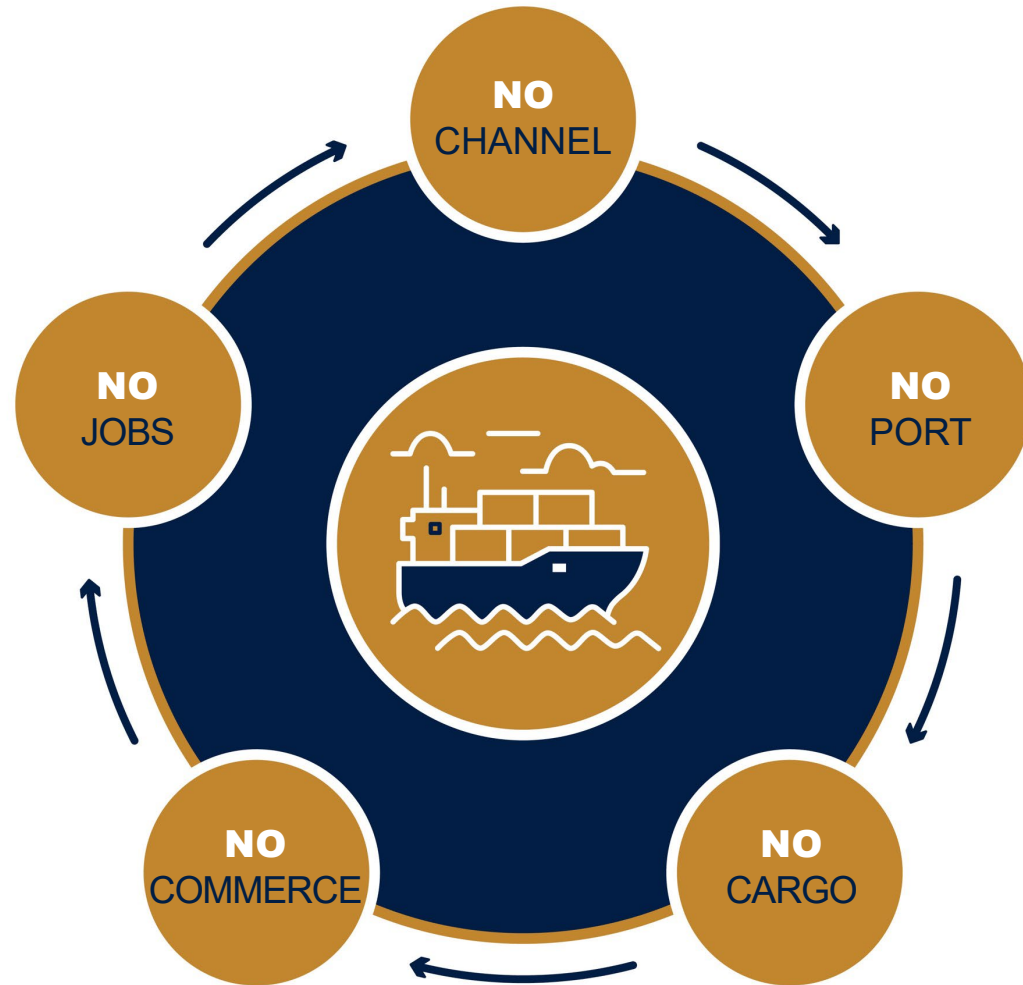
trade development manager
for the Port of Houston

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.



PORT HOUSTON

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

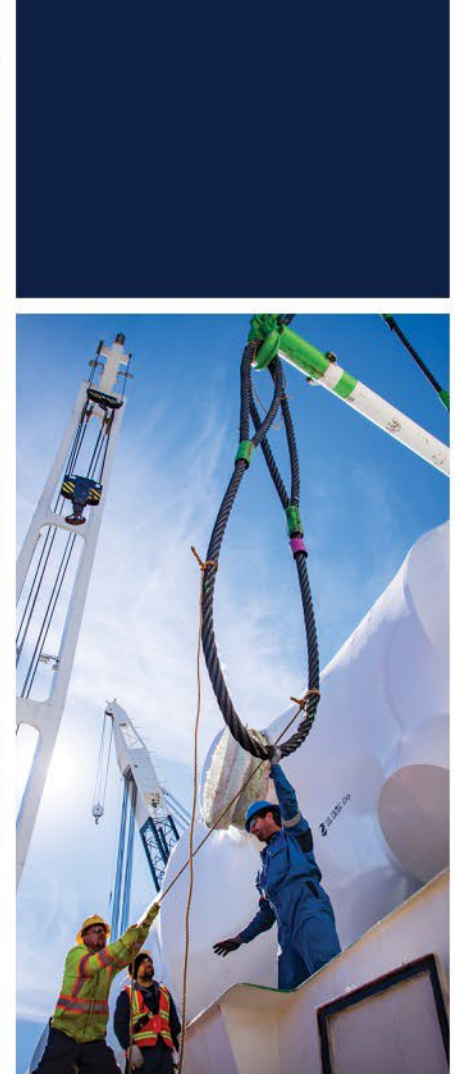
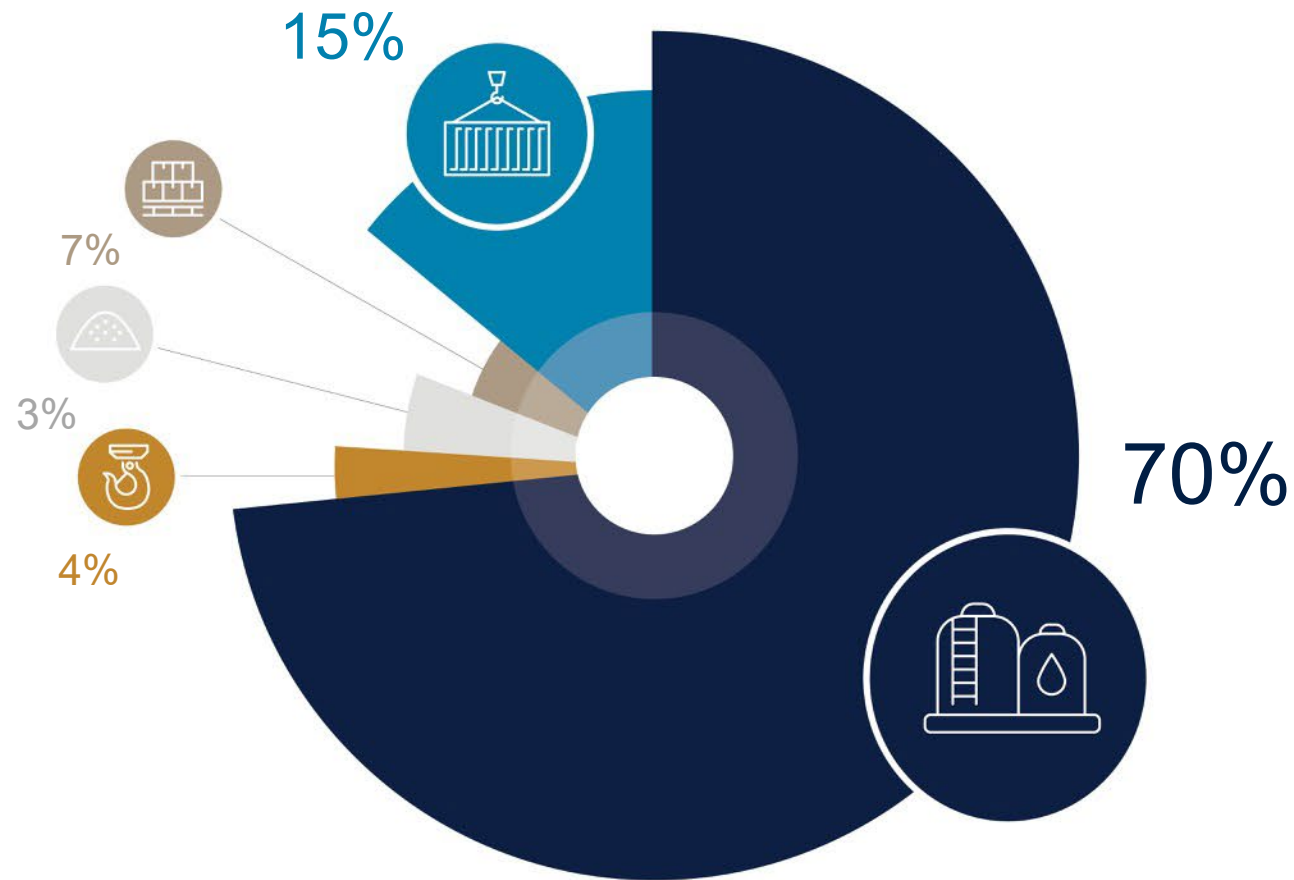
THE ENERGY CAPITAL OF THE WORLD

- 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

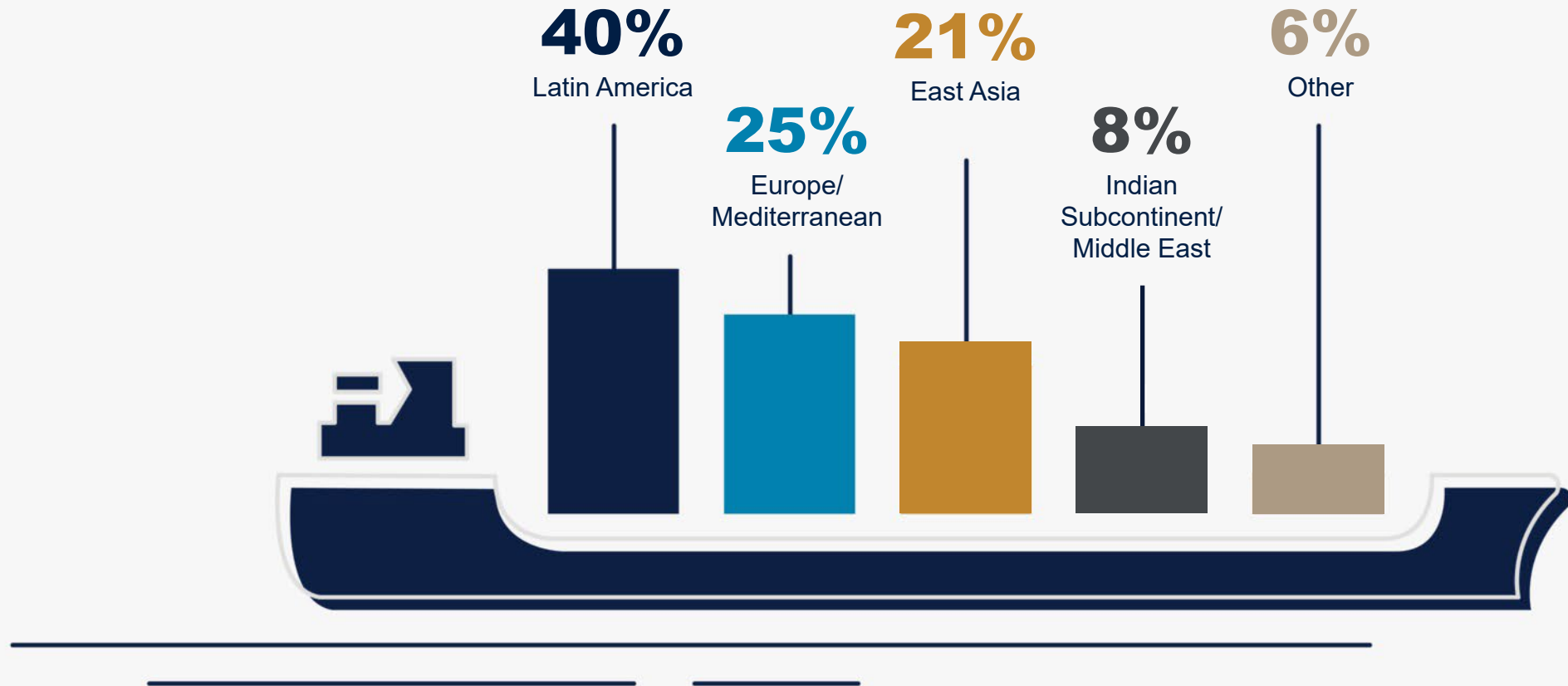
CARGO SECTORS 2023 (YTD NOV)



- 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

Petredec

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

HSC Import Commodities	MTONS
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

HSC Export Commodities	MTONS
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



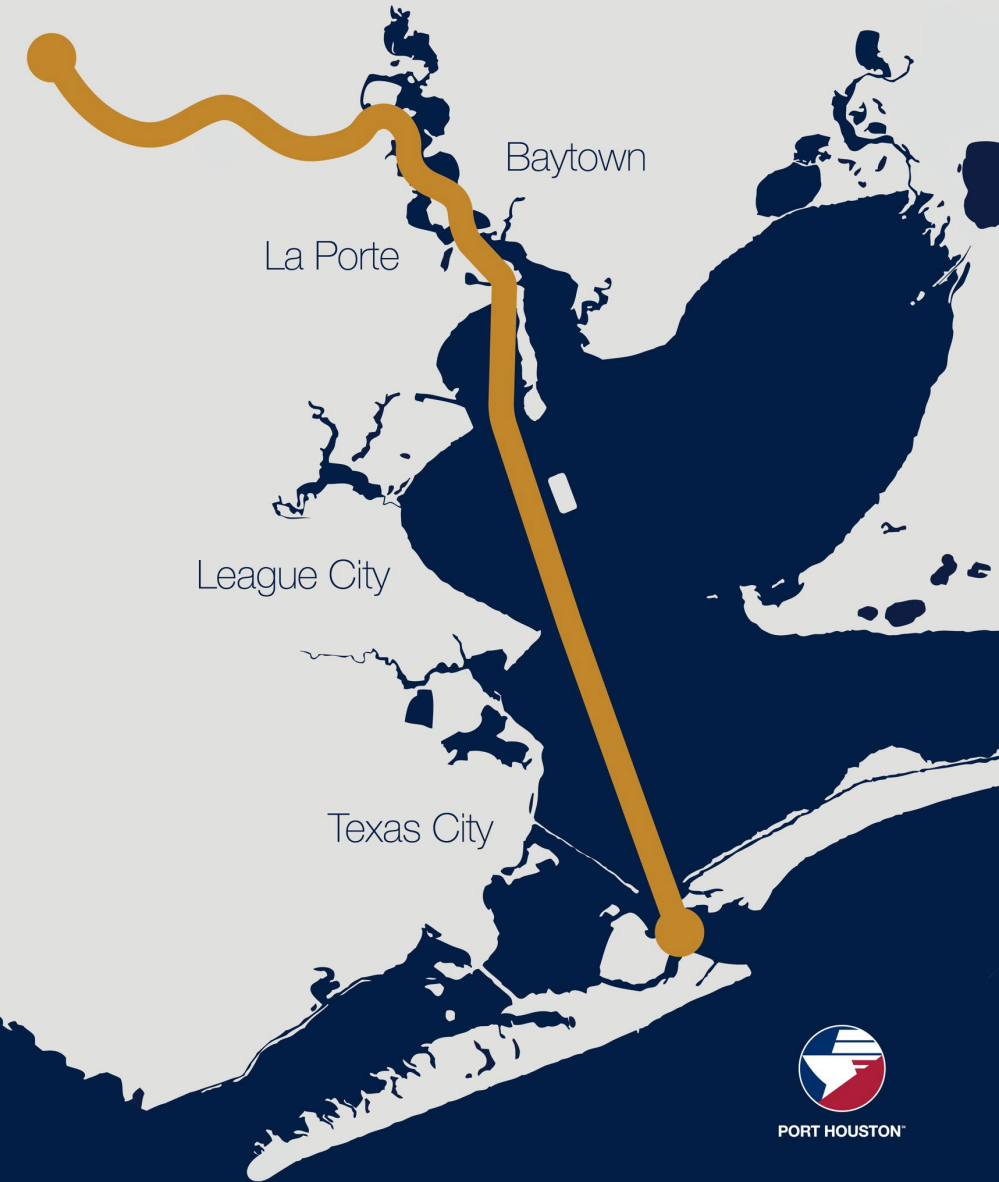
Alan Robb
Commissioner

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

**Turning
Basin**

**Woodhouse
Grain Elevator**

**Bulk
Handling**

**Jacintoport
& CARE**

**Barbours
Cut**

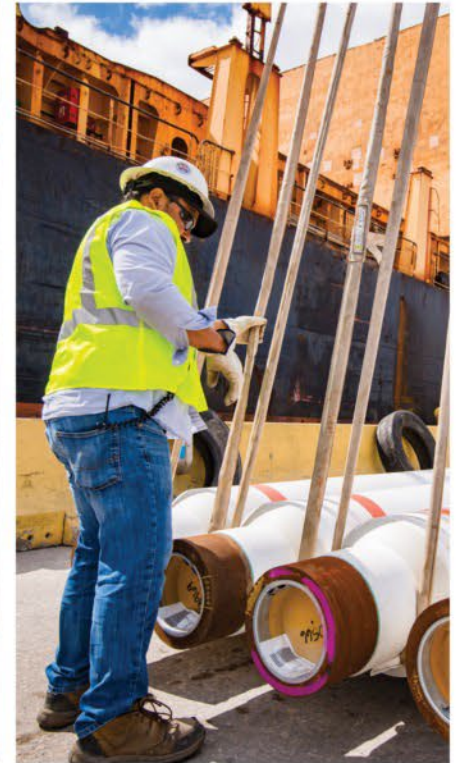
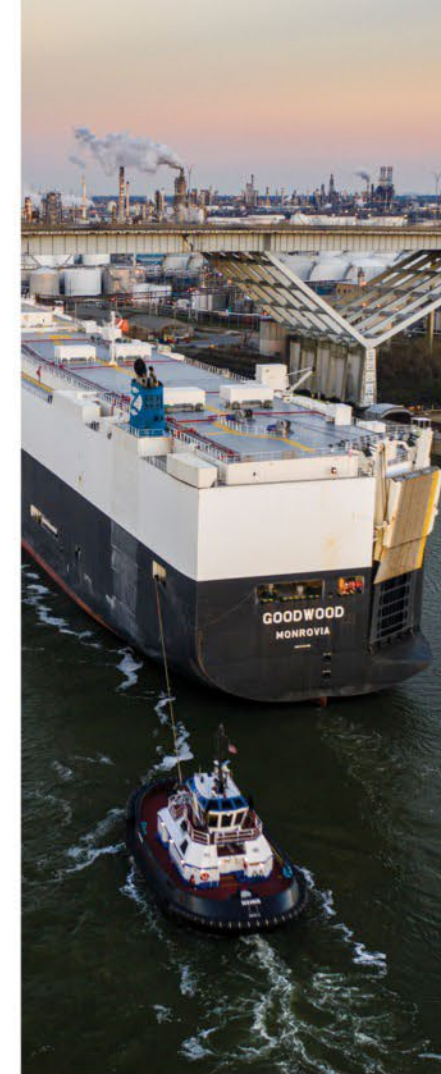
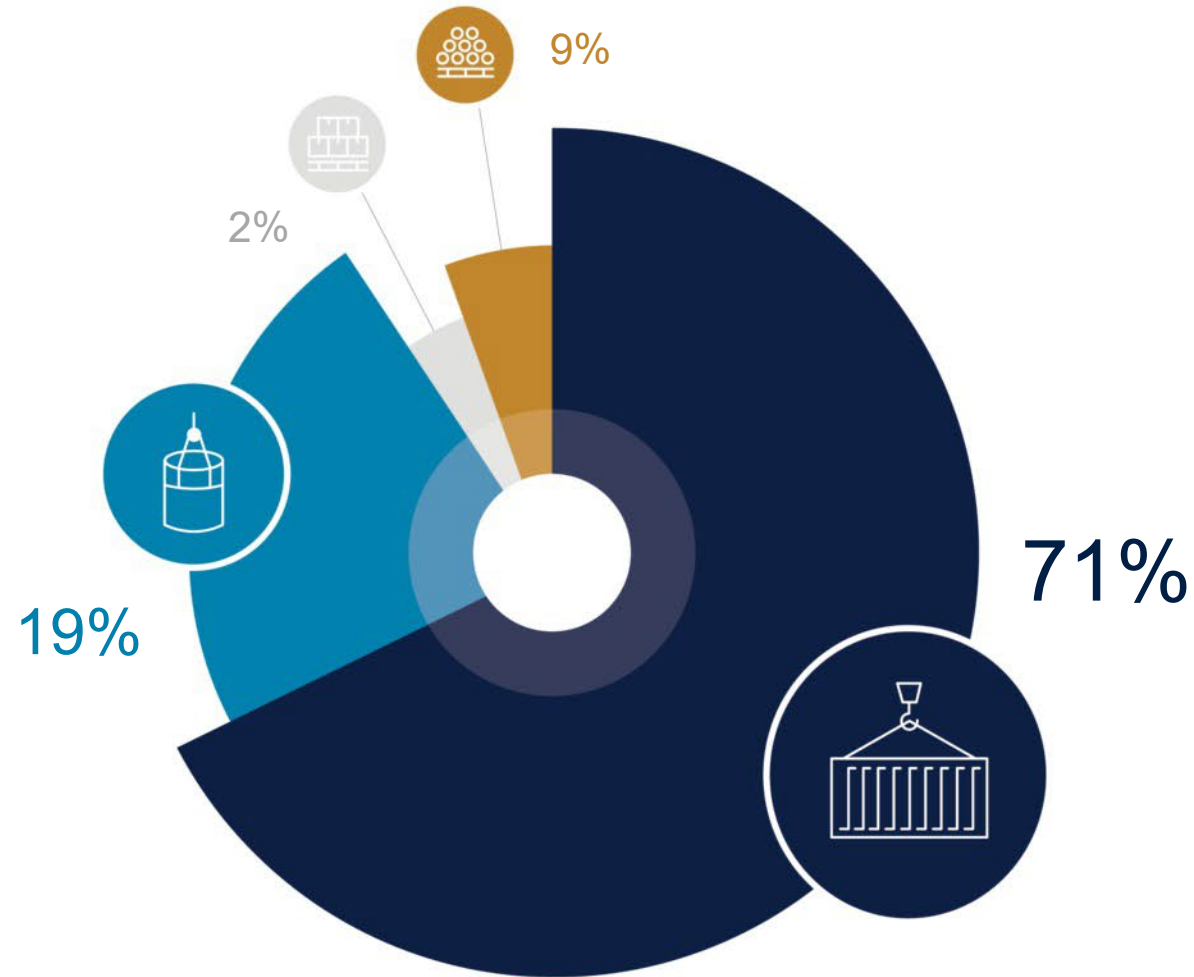
Bayport



PORT HOUSTON

PORT HOUSTON

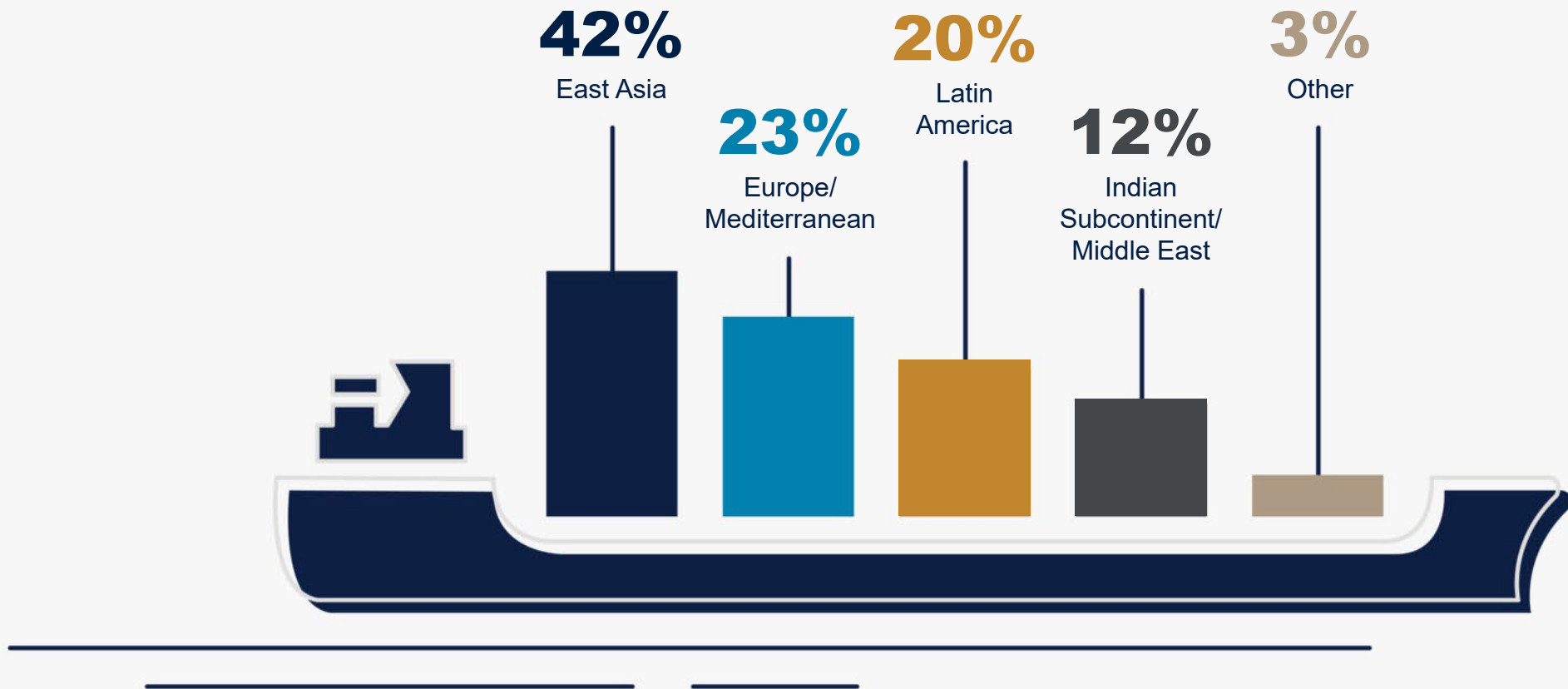
CARGO SECTORS 2023



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

PORT HOUSTON

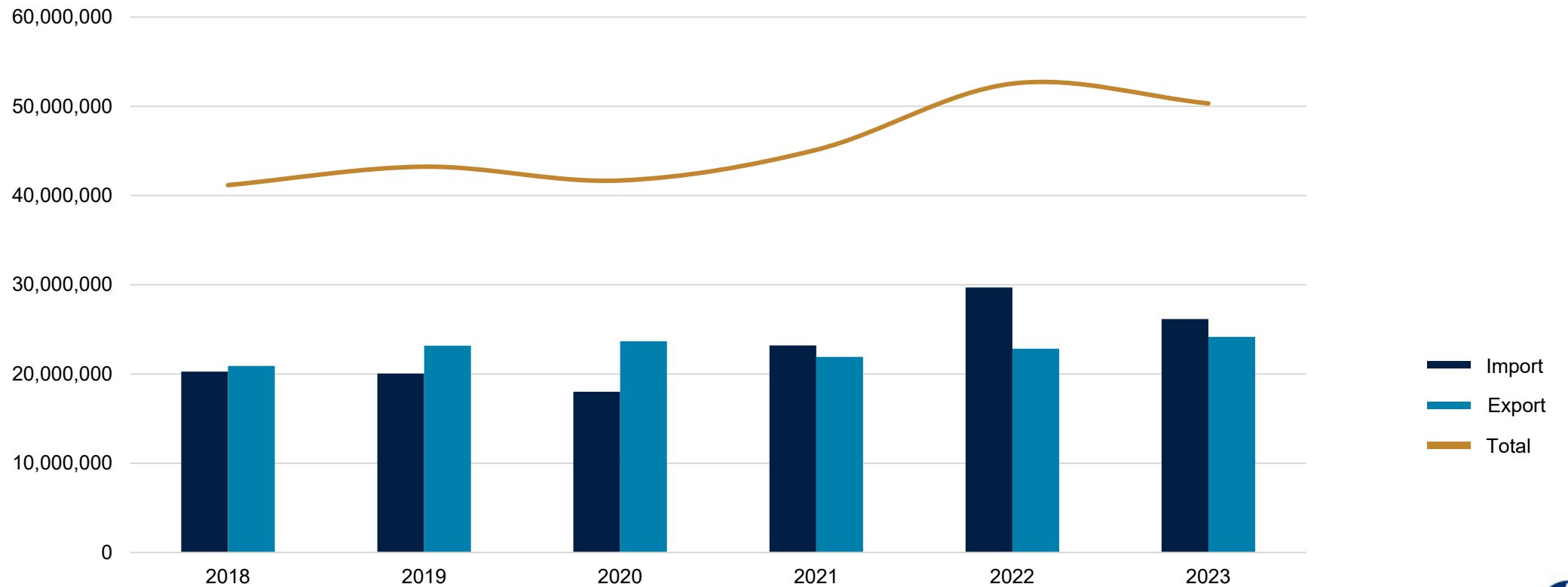
WHERE ARE THE CONTAINERS COMING FROM OR GOING TO?



PORT HOUSTON

TONNAGE GROWTH | 2016-2023

PH Tonnage excluding BIC (Short Tons)



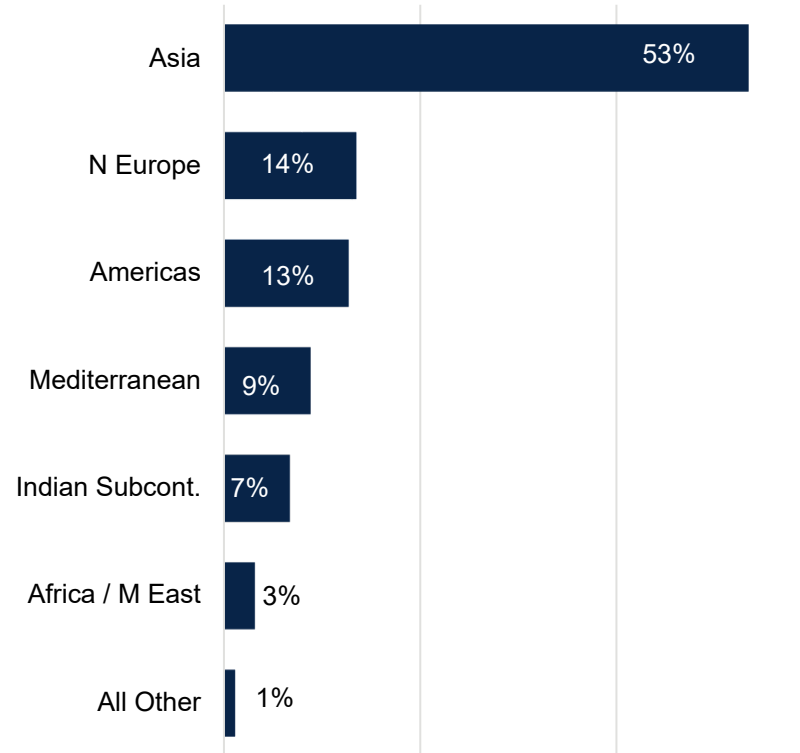
Note: 1 Short Ton Equals 0.907 Metric Ton
Source: PH Accounting, PH Research & Forecasting



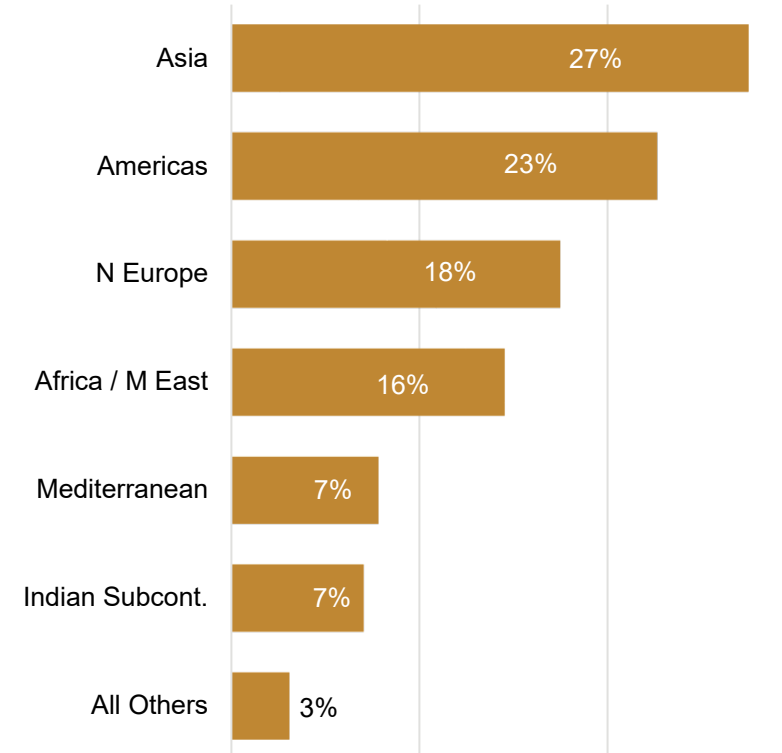
CONTAINER TRADE SHARE

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
Machinery, Appliances & Electronics	307,754
Retail Consumer Goods	272,357
Hardware & Construction Materials	244,145
Food & Drink	219,371
Furniture	207,866
Resins & Plastics	139,967
Steel & Metals	131,023
Automotive	124,241
Chemicals & Minerals	108,970
Apparel & Accessories	80,592
Fabrics including Raw Cotton	35,034
Other	26,086

Port Houston Export Commodities	TEU
Resins & Plastics	483,541
Chemicals & Minerals	239,229
Automotive	104,155
Food & Drink	73,564
Apparel & Accessories	64,168
Machinery, Appliances & Electronics	61,734
Steel & Metals	55,726
Fabrics including Raw Cotton	53,786
Retail Consumer Goods	24,262
Hardware & Construction Materials	15,692
Furniture	5,940
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



PORT HOUSTON™

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

Mexilink

Unimacts Global

Smitty Bee Honey

Coco Lopez

Fonterra

Top 10 Exporters

Hoogwegt

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, Flavord Etc Or Not

Birds' Eggs, Not In Shell & Yolks, Fresh, Dry, Etc

Birds' Eggs, In The Shell, Fresh, Preserv Or Cookd

Honey, Natural

EXPANDING THE CHANNEL

Project 11

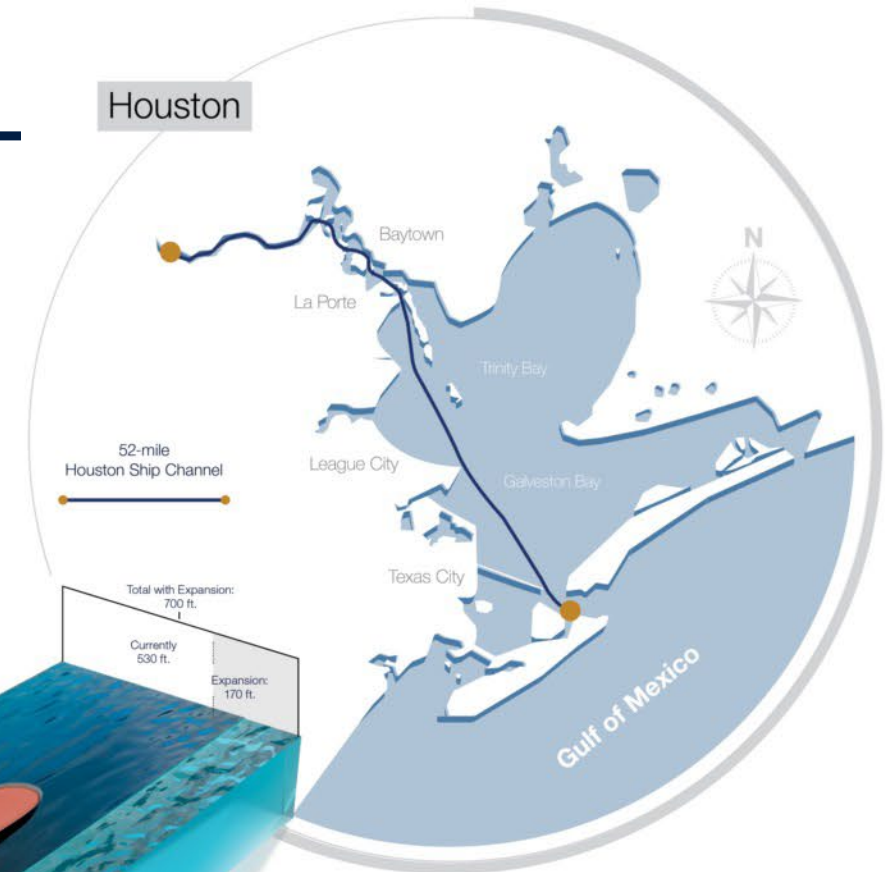
- Port Houston's most ambitious expansion initiative yet

The goal

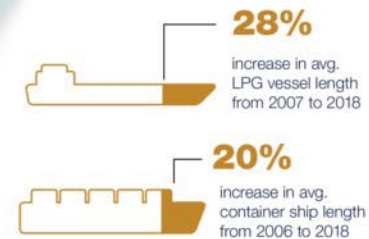
- To widen much of the federal channel from 530 feet to 700 feet and make additional enhancements

\$1 billion

- Public/private partnership project



Total with Expansion:
700 ft.
Currently
530 ft.
Expansion:
170 ft.



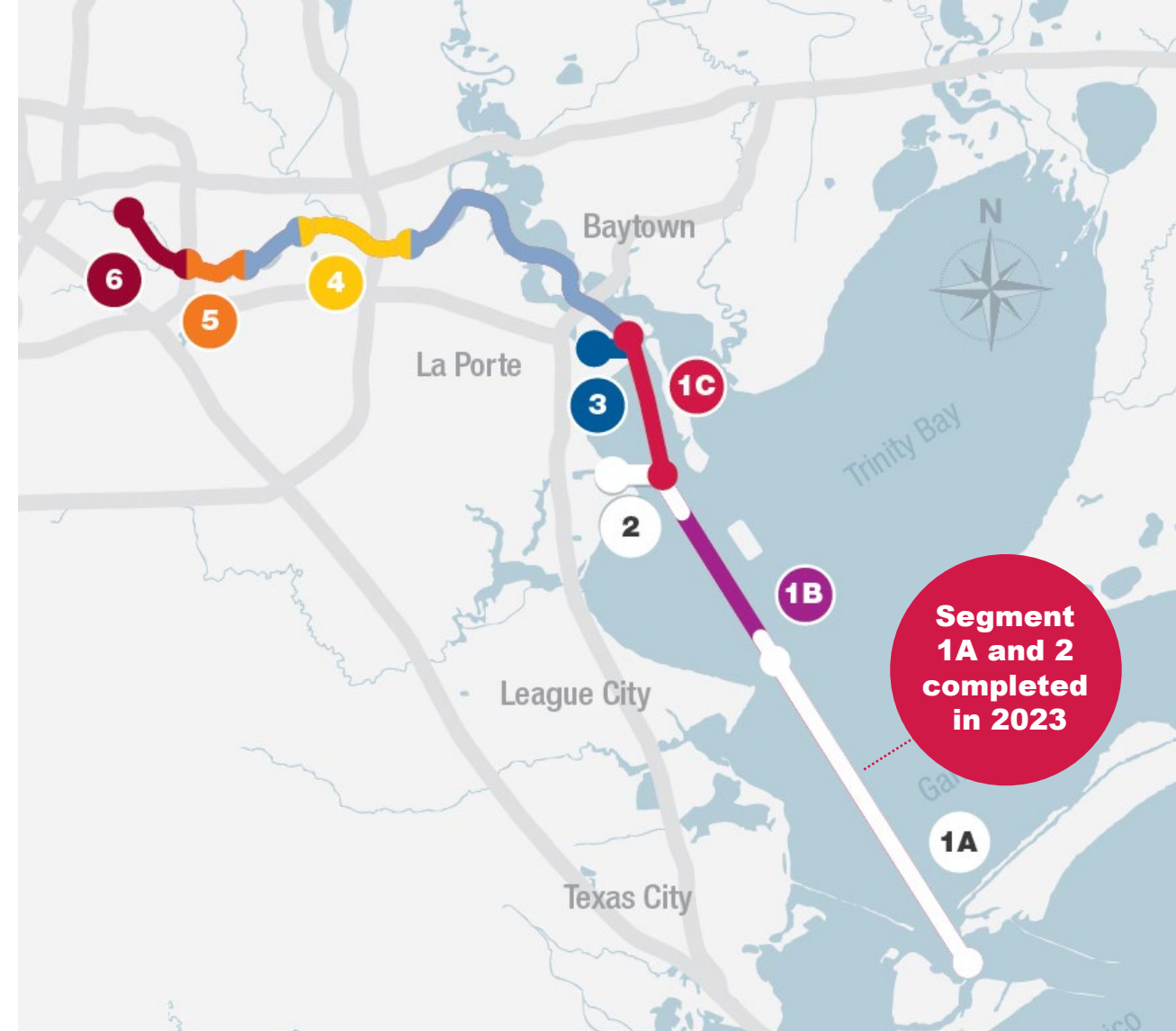
Visit: www.expandthehoustonshipchannel.com



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

BAYPORT CONTAINER TERMINAL



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

**\$1.3
BILLION**

	Current	At Build-Out
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



W7—2026
1000 LF | \$125M

W6—Complete
1000 LF | \$94M

CY1S—2025
23 acres | \$90M

CY1N&M—2024
42 acres | \$74M

W1—2027
1500 LF | \$245M

EE S CY9—2028
50 acres | \$110M

EE N CY8—2025
50 acres | \$110M

W8—2030
1500 LF | \$345M



PORT HOUSTON

BARBOURS CUT CONTAINER TERMINAL



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

**\$705
MILLION**

	Current	At Build-Out
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



PORT HOUSTON

BREAKBULK TERMINALS

**Turning
Basin**

**Woodhouse
Grain Elevator**

**Bulk
Handling**

**Jacintoport
& CARE**

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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Visit: **www.porthouston.com**

