

THE ECONOMIC IMPACTS OF THE PORT OF HOUSTON ON THE STATE OF TEXAS, 2025



PORT HOUSTON™

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SUMMARY

Martin Associates was retained by the Port of Houston Authority of Harris County, Texas (“PHA”) to estimate the economic impacts generated by marine cargo activity at the public and private marine terminals located along the Houston Ship Channel. The public marine terminals are those owned, leased or operated by the Port of Houston Authority and include the Houston Public Grain Elevator #2, the Fentress Bracewell Barbours Cut Container Terminal, the Bayport Container Terminal, the Bulk Materials Handling Plant, Jacintoport, the Care Terminal, the PHA Terminals in the Houston Turning Basin and the Woodhouse Terminal. Private terminals include the petroleum refineries, general cargo terminals (e.g., Manchester Terminal, Greensport Terminal, etc.), the petrochemical plants and the dry bulk/fertilizer terminals.

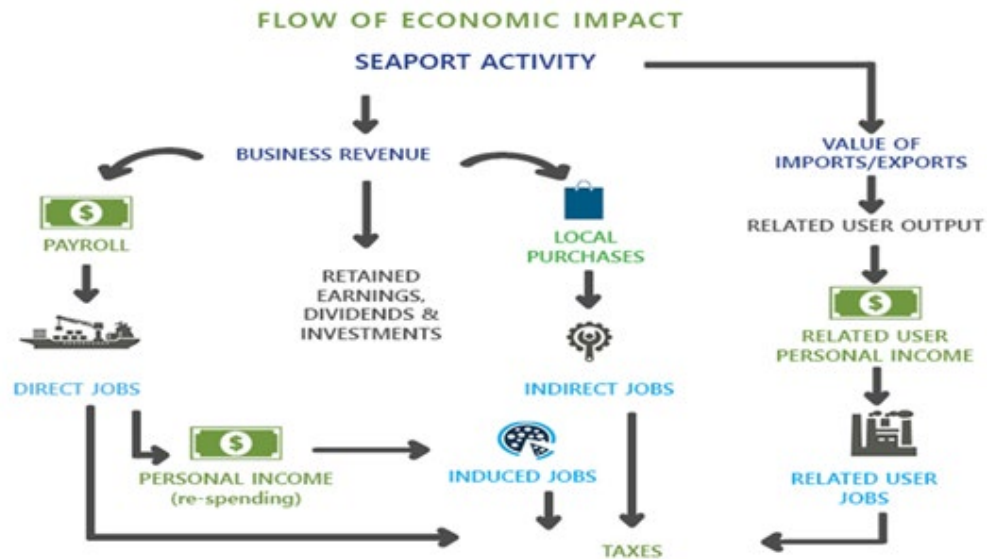
The impacts are measured for the year 2025 and separate economic impact models have been developed to measure the impacts generated by the PHA public facilities and the impacts generated by the total marine cargo and vessel activity at both the public and private marine terminals. These economic impact models can be used to estimate annual updates, as well as to test the sensitivity of the impacts to changes in such factors as marine cargo tonnage levels, labor productivity and work rules, new marine facilities development and expansion and the impacts of harbor and channel deepening. The models can also be used to compare the economic impacts of marine activity with non-maritime development of waterfront land.

For the most part, the same methodology has been used to estimate the 2025 economic impacts as was used to estimate the economic impacts of the Port of Houston in 2022;¹ therefore, the results of this study can be directly compared with those of the earlier study.

Exhibit E-1 graphically demonstrates how seaport activity impacts the local and regional economies. As this exhibit indicates, the marine cargo and vessel activity initially generate business revenue to the firms supplying marine services. This revenue is used to purchase employment (direct jobs) to provide the services, to pay stockholders and for retained earnings and to purchase goods and services from local firms, as well as national and international firms (creating indirect jobs with these firms). Businesses also pay taxes from the business revenue.

¹ The Local and Regional Economic Impact of the Port of Houston, 2022, prepared for the Port of Houston Authority, April, 2024, by Martin Associates. This same methodology has been used by Martin Associates to estimate the economic impacts of the Port of Houston about every three to four years since 1987.

Exhibit E-1
Flows of Economic Impacts through the Economy



The employees hired by the firms receive wages and salaries (personal income), a portion of which is saved, while another portion is used to buy goods and services such as food, housing, clothing, health care, etc. These purchases create a re-spending impact throughout the economy, known as the personal income multiplier. As a result of these local purchases, additional jobs (known as induced jobs) are created in the local economy. Local purchases are also made by the firms directly dependent upon the Port of Houston, including the petroleum refineries and petrochemical plants located along the Houston Ship Channel, as well as firms providing services to the port such as stevedores, terminal operators, trucking firms and railroads, steamship lines and agents and freight forwarders. The local purchases by directly dependent firms create indirect jobs. Finally, taxes are paid by individuals employed with the firms providing the services to the marine terminals and by the firms directly dependent upon the port.

As demonstrated by this chart, four types of impacts are measured:

- Jobs
- Employee earnings
- Business revenue
- State and local taxes

With respect to jobs, four types of job impacts are measured. These are direct, induced, indirect and related jobs. The job impacts are defined as follows:

- Direct jobs are those jobs with local firms providing support services to the seaport. These jobs are dependent upon this activity and would suffer immediate dislocation if the seaport activity were to cease. Seaport direct jobs include jobs with railroads and trucking companies moving cargo to and from the PHA's marine terminals and private terminals, members of the International Longshoremen's Association (ILA) and non-ILA dockworkers, steamship agents, freight forwarders, ship chandlers, warehouse operators, bankers, lawyers, terminal operators and stevedores.
- Induced jobs are jobs created locally and throughout the regional economy due to purchases of goods and services by those directly employed. These jobs are with grocery stores, the local construction industry, retail stores, health care providers, local transportation services, local and state government agencies providing public services and education to those directly employed and businesses providing professional and business services in support of those directly employed. These goods and services would also be discontinued if seaport activity were to cease.
- Indirect jobs are those jobs generated in the local economy as the result of local purchases by the firms directly dependent upon seaport activity. These jobs include jobs in local office supply firms, equipment and parts suppliers, maintenance and repair services, insurance companies, consulting and other business services. If port operations were discontinued, these indirect purchases and the associated jobs and income would also be discontinued.
- Related jobs are jobs that are determined to be related to physical cargo that is exported and imported via the Port of Houston public and private marine terminals in 2025. These jobs include the portion of jobs at importing and exporting firms that are directly associated with the cargo moved via the Port of Houston marine terminals, but not generated by the actual port operations. It is the demand for the product that generates the employment and other impacts with the shippers/consignees. See “related user impacts” below for more details.

The personal income impact consists of wages and salaries and includes a re-spending effect (local purchases of goods and services by those directly employed) as well as the wages paid to indirect jobs holders, while business revenue consists of total business receipts by firms providing services in support of the marine activity. State and local taxes include taxes paid by individuals, as well as firms dependent upon the seaport activity.

In addition to the direct impacts, induced and indirect impacts also support activity with regional exporters and importers using the Port of Houston’s public and privately owned marine terminals. These impacts are classified as ***related user impacts*** in that the exporters and importers using the marine

terminals can and do use other ports for the shipment and receipt of cargo. The related user impacts are the jobs, income, revenue and state and local taxes related to the value and tonnage of the cargo exported and imported via the Port of Houston public and private marine terminals in 2025 and does not include the total employment, revenue and taxes with the importers and exporters, only that portion associated with the cargo moved via the Port of Houston marine terminals. The related impacts measure the impact or influence, of the port's marine terminals at a given point in time and if the port's terminals were no longer used by these importers and exporters, these influenced users would use other ports to export and import cargo. Unlike the direct, induced and indirect impacts, the related impacts would not necessarily be dislocated from the economy – instead, the impacts would no longer be related to the Port of Houston, but to another port through which this cargo would be routed.

The study is based on data collected from over 1,000 firms in the Martin Associates' database for the Port of Houston. As part of this database, Martin Associates reviews and updates firm specific data for maritime industry service providers, terminal operators and ocean carriers operating along the Houston Ship Channel that we have established over the past 40 years. In addition, the survey data is augmented with firm specific data developed from The Houston Ship Channel Security District, A to Z Data Base, and published literature regarding specific tenants and service providers providing services to the cargo and vessels handled at the PHA's marine terminals and the private terminals along the Houston Ship Channel. The impacts can be traced back to the individual firm and changes in impacts from study period to study period can be identified and explained. The data collected from the interviews and above noted sources was then used to develop an operational model of the PHA public and private marine terminals.

SUMMARY OF IMPACTS GENERATED BY THE PORT OF HOUSTON

The economic impacts generated by the public and private marine terminals are summarized in Exhibit E-2.

Exhibit E-2

Summary of the Local and Regional Economic Impacts Generated by the Port of Houston Public and Private Marine Terminals

	PHA Terminals	Private Terminals	Total
JOBS			
Direct	29,361	62,969	92,330
Induced	45,307	101,120	146,427
Indirect	21,646	46,423	68,069
<i>Subtotal</i>	<i>96,314</i>	<i>210,512</i>	<i>306,826</i>
Related	<u>1,007,734</u>	<u>571,611</u>	<u>1,579,345</u>
Total	1,104,048	782,123	1,886,172
PERSONAL INCOME (MILLIONS)			
Direct	\$2,621	\$5,895	\$8,516
Re-spending/Local Personal Consumption	\$8,594	\$19,329	\$27,923
Indirect	\$875	\$1,876	\$2,751
<i>Subtotal</i>	<i>\$12,090</i>	<i>\$27,100</i>	<i>\$39,190</i>
Related	<u>\$59,810</u>	<u>\$51,325</u>	<u>\$111,135</u>
Total	\$71,901	\$78,425	\$150,325
TOTAL ECONOMIC VALUE (MILLIONS)			
Direct Business Revenue	\$8,909	\$27,227	\$36,136
Re-spending/Local Personal Consumption	\$8,594	\$19,329	\$27,923
Related Output	<u>\$246,497</u>	<u>\$227,098</u>	<u>\$473,595</u>
Total Economic Value	\$264,001	\$273,653	\$537,654
LOCAL PURCHASES (MILLIONS)	\$2,534	\$5,434	\$7,968
STATE/LOCAL TAXES (MILLIONS)			
Direct	\$272	\$631	\$903
Induced	\$816	\$1,836	\$2,653
Indirect	\$83	\$178	\$261
<i>Subtotal</i>	<i>\$1,172</i>	<i>\$2,645</i>	<i>\$3,817</i>
Related	<u>\$6,323</u>	<u>\$5,466</u>	<u>\$11,789</u>
Total	\$7,495	\$8,112	\$15,606

Totals may not add due to rounding

Specifically, the public and private marine facilities generated the following impacts in the state of Texas in 2025:

- **1,886,172 jobs in Texas** are in some way related to the cargo moving via the public and private marine terminals at the Port of Houston.
- Of the 1,886,172 jobs in Texas, **92,330 direct jobs** are generated by the marine cargo and vessel activity at the public and private marine terminals. About 73 percent of these direct jobs are held by residents of Harris County.
- As the result of local and regional purchases by those 92,330 individuals holding the direct jobs, an additional **146,427 induced jobs** are supported in the regional economy.
- **68,069 indirect jobs** were supported by \$8.0 billion of local purchases by businesses supplying services at the marine terminals and by businesses dependent upon the Port of Houston.
- The balance, 1,579,345 jobs are classified as related jobs and are with importers and exporters and supporting firms using the Port of Houston public and private marine terminals in 2025.

In 2025, marine cargo activity at the public and private marine terminals at the Port of Houston and along the Houston Ship Channel supported a total of \$537.7 billion of total economic value in the state of Texas. This represents about 18.5 percent of the \$2.9 trillion state of Texas Gross Domestic Product².

- Of the \$537.7 billion, \$36.1 billion is the direct business revenue received by the firms directly dependent upon the port and providing maritime services and inland transportation services to the cargo handled at the marine terminals and the vessels calling the port. An additional \$473.6 billion represents the value of the output to the state of Texas that is created due to the cargo moving via the Port of Houston public and private marine terminals. This includes the value added at each stage of producing an export cargo, as well as the value added at each stage of production for the firms using imported raw materials and intermediate products that flow via the marine terminals and are consumed within the state. The majority of these user impacts are associated with the containerized cargo and imported steel products receipts. In addition, \$27.9 billion of the re-spending of personal income and local consumption purchases are supported in the local and regional economy. These components are additive and represent independent monetary impacts supported by the cargo and vessel activity. Other dollar value impact

² U.S. Bureau of Economic Analysis, 2025 GDP for state of Texas

measures are not included in the total economic value since they are interdependent. Direct income is not included since it is part of the direct business impact and similarly, local purchases by the firms are from the direct business revenue generated by port activity and also used to pay indirect income. Finally, taxes are paid by the individuals from the direct, induced, indirect and related income and the direct business revenue and the related output.

- Marine activity supported \$150.3 billion of total personal wage and salary income and local consumption expenditures for Texas residents. This includes \$39.2 billion of direct, indirect, induced, and local consumption expenditures, while the remaining \$111.1 billion was received by the related port users. The 92,330 direct job holders received \$8.5 billion of direct wage and salary income, for a direct annual salary of \$92,230. This compares to \$65,750, which is the mean annual salary in 2025 for all workers in the state of Texas, as reported by the U.S. Bureau of Labor Statistics³.

A total of \$3.8 billion of direct, induced, and indirect state and local tax revenue was generated by maritime activity at the public and private terminals along the Houston Ship Channel. In addition, \$11.8 billion of state and local taxes were created due to the economic activity of the related users of the cargo moving via the public and private marine terminals. The total tax impact, including the impact of the related port users is \$15.6 billion.

PORT OF HOUSTON AUTHORITY PUBLIC TERMINAL IMPACTS

The jobs, income, revenue, and tax impacts generated by the Port of Houston Authority's marine terminals are a subset of the port-wide impacts discussed in the previous section. It is important to separately identify and develop an economic impact model of the impacts generated by the Port of Houston Authority's marine terminals, in order to assess the impacts of new public investment in port facilities and to provide a tool to assist the Port of Houston Authority in future public port planning decisions. The impacts summarized in this section are those generated by the Port of Houston Authority's marine cargo terminals, including Houston Public Grain Elevator #2, Fentress Bracewell Barbours Cut Terminal, Bayport Container Terminal, PHA Terminals at the Turning Basin, Jacintoport, Care Terminal, Bulk Materials Handling Plant, and the Woodhouse Terminal.

- Of the 1,886,172 jobs held by Texas residents that are related to marine cargo and vessel activity at public and private marine terminals at the Port of Houston, 1,104,048 jobs are supported by activity at the Port of Houston Authority owned, leased or operated terminals.

³ U.S. Bureau of Labor Statistics, Occupational Employment and Wage Statistics, May 2025

- Of the 1,104,048 total jobs are in some way related to the Port of Houston Authority's marine terminals, **29,361 direct jobs are generated by marine cargo activity at the PHA terminals.**
- As the result of local purchases by these 29,361 directly employed individuals, an additional **45,307 induced jobs are generated in the local economy.**
- About \$2.5 billion of local purchases by firms providing services to the PHA marine terminals supported an additional **21,646 indirect jobs.**
- The balance, 1,007,734 jobs are classified as related jobs and are with importers and exporters and supporting firms using the Port of Houston Authority terminals in 2025.

In 2025, marine cargo activity at the PHA owned and leased public marine terminals supported a total of \$264.0 billion of total economic value in the state of Texas.

- Of the \$264.0 billion, \$8.9 billion is the direct business revenue received by the firms directly dependent upon the port and providing maritime services and inland transportation services to the cargo handled at the marine terminals and the vessels calling the port, as well as ship and rig repair and maintenance services. An additional \$246.5 billion represents the value of the output to the state of Texas that is created due to the cargo moving via the Port of Houston Authority's marine terminals. This includes the value added at each stage of producing an export cargo, as well as the value added at each stage of production for the firms using imported raw materials and intermediate products that flow via the marine terminals and are consumed within the state. The remainder, \$8.6 billion represents the personal re-spending and local personal consumption impact.
- Marine activity at the PHA owned or leased facilities supported \$71.9 billion of total personal wage and salary income and local consumption expenditures for Texas residents. This includes \$12.1 billion of direct, indirect, and re-spending and local consumption expenditures, while the remaining \$59.8 billion was received by the related port users as personal income.

A total of \$1.2 billion of direct, induced, and indirect state and local tax revenue was generated by maritime activity at the public terminals along the Houston Ship Channel. In addition, \$6.3 billion of state and local taxes were created due to the economic activity of the related users of the cargo moving via the public marine terminals. In total \$7.5 billion of state and local taxes were supported by marine cargo activity at PHA terminals.

COMPARISON OF PORT-WIDE IMPACTS WITH THE 2022 IMPACT MEASURES

The same methodology has been used by Martin Associates to measure the economic impacts waterborne cargo activity at the public and private marine terminals within the Port of Houston Port District for every three to four years since 1987. The most recent study completed for the Port by Martin Associates was in 2022. Therefore, the impacts of the 2025 maritime activity can be compared to the results of the 2022 study. Overall, the changes in economic impacts are driven by changes in tonnage levels; any additions or deletions of terminal operators, tenants or dependent shippers/consignees; as well as changes in the economic impact model underlying structure that would reflect dynamic changes in the Houston, state-wide and national economies, such as recessions, inflation, growth in productivity, and changes in consumption behavior of the direct job holders.

During the 2022-2025 period, changes in tonnage levels as well as structural changes in the economy and hence the underlying economic relationships within the impact model occurred. With respect to changes in waterborne activity, total cargo handled at the public and private terminals at the Port of Houston grew by 32.8 million tons since 2022. The growth of cargo was concentrated with liquid and dry bulk cargo, most notably the growth of petroleum exports and petrochemical imports, exports and domestic waterborne shipments and receipts from 2022 levels. Dry bulk cargoes increased by about 1.5 million tons. In addition to the growth in liquid and dry bulk cargo, containerized cargo grew by nearly 5 million tons over 2022 levels. Offsetting the growth of the liquid bulk and containerized cargo, steel imports fell by nearly 2 million tons, and breakbulk cargoes fell by nearly 1.5 million tons port-wide since 2022, reflecting in part the impact of the iron and steel tariffs.

In addition to the tonnage level changes and resulting changes in direct impacts, there are several structural changes in the impact model due to changes in the Texas and national economies that occurred since the last study. The jobs to sales ratios developed from the U.S. Bureau of Census, Economic Census (conducted every five years), used in estimating induced and indirect impacts changed since the 2022 study. In the 2022 Port of Houston Economic Impact Study, the jobs to sales ratios are based on the 2017 Economic Census, due to the fact that the Economic Census data is typically released on a two-year delay and the 2022 Economic Census data was not released until 2025. This most recent Economic Census data, both at the State and national levels, reflects changes in productivity, as well as the impact of COVID that occurred since the 2017 Census data. The jobs to sales ratios used to convert the re-spending impact by the direct job holders into induced fell significantly over the period, as did the jobs to sales ratios used to convert the purchases by the firms providing the direct service into indirect impacts. This contraction of jobs to sales ratios results in less induced and indirect jobs generated per dollar of consumer re-spending (which generates induced jobs) as well as purchases by the firms providing the direct services to the marine cargo and vessel activity, which generates the indirect jobs. For the induced jobs, one dollar of purchases by the direct job holders in 2025 generated 20% less induced jobs than was the case in the 2022 study. For indirect jobs, one dollar of purchases by the directly dependent firms generated 11% less jobs in 2025 than was the case in the 2022 study (which was based on the 2017 Economic Census data). With these

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structural changes identified, comparisons can be made between the 2022 and 2025 economic impact studies.

Port-wide, direct jobs increased by 14,022 new jobs since 2022. Induced jobs grew by 8,266 jobs, reflecting the growth in the direct jobs, as well as the increase in the average direct income from \$83,613 2022 to \$92,230 in 2025.⁴ This growth in average income resulted in an increase in the re-spending impact, in turn supporting increased induced jobs and local consumption impact. Indirect jobs fell by 718 jobs reflecting the lower jobs generated per dollar of purchases in the indirect job quantification that occurred since 2022. The increase in local purchases by the firms providing the direct services in 2025 was not sufficient to offset the decline in jobs generated per dollar of purchases that occurred since the 2022 study. When direct, induced and indirect jobs are considered, the port activity at the public and private marine terminals increased by 21,570 jobs due primarily to the growth in jobs associated with the growth in containerized cargo and petrochemicals and other liquid bulk cargoes. Jobs with importers and exporters using the public and private marine terminals grew by 324,185 jobs, also reflecting the growth in containerized cargo as well as petroleum exports and petrochemical imports and exports. The total economic value of the Port of Houston public and private terminals to the state of Texas grew by \$98.4 billion, reflecting the total economic value supported by containerized cargo and liquid bulk cargo moving via these terminals.

Exhibit E-3 presents a comparison of the total impacts generated by both public and private terminals.

⁴ The growth in average income per direct employee and the growth in number of direct jobs offset the decline in the number of induced jobs generated per dollar of consumption re-spending that occurred from the structural shifts in the jobs to sales ratios

Exhibit E-3
Comparison of Direct Economic Impacts: 2022-2025
Public and Private Marine Facilities

	Port-Wide Impacts 2025	Port-Wide Impacts 2022	Change
JOBS			
Direct	92,330	78,308	14,022
Induced	146,427	138,161	8,266
Indirect	68,069	68,787	-718
<i>Subtotal</i>	<i>306,826</i>	<i>285,257</i>	<i>21,570</i>
Related	<u>1,579,345</u>	<u>1,255,160</u>	<u>324,185</u>
Total	1,886,172	1,540,417	345,755
PERSONAL INCOME(MILLIONS)			
Direct	\$8,516	\$6,548	\$1,968
Re-spending/Local Personal Consumption	\$27,923	\$20,329	\$7,595
Indirect	\$2,751	\$2,780	-\$29
<i>Subtotal</i>	<i>\$39,190</i>	<i>\$29,657</i>	<i>\$9,534</i>
Related	<u>\$111,135</u>	<u>\$92,471</u>	<u>\$18,664</u>
Total	\$150,325	\$122,128	\$28,197
TOTAL ECONOMIC VALUE (MILLIONS)			
Direct Business Revenue	\$36,136	\$29,557	\$6,579
Re-spending/Local Personal Consumption	\$27,923	\$20,329	\$7,595
Related Output	<u>\$473,595</u>	<u>\$389,332</u>	<u>\$84,263</u>
Total Economic Value	\$537,654	\$439,218	\$98,437
LOCAL PURCHASES (MILLIONS)	\$7,968	\$7,203	\$766
STATE/LOCAL TAXES (MILLIONS)			
Direct, Induced, Indirect	\$3,817	\$2,580	\$1,237
Related	<u>\$11,789</u>	<u>\$8,045</u>	<u>\$3,744</u>
Total	\$15,606	\$10,625	\$4,981

Totals may not add due to rounding

COMPARISON OF PHA SUPPORTED IMPACTS WITH THE 2022 IMPACT MEASURES

Between 2022 and 2025, tonnage handled at PHA terminals fell by 463,000 tons, reflecting a 1-million-ton loss of steel products and 4-million-ton loss of bulk imports and exports. The majority of the bulk tonnage decline is driven by the loss of 3.2 million tons of liquid bulk cargo. In addition, breakbulk tonnage declined by 622,000 tons since 2022, including the loss of forest products, bagged cargo and miscellaneous breakbulk cargoes. Finally, the loss of auto and RoRo tonnage reflects the loss of the major auto account at the PHA terminals. In contrast the PHA terminals experienced a 5.2-million-ton increase in containerized cargo.

Exhibit E-4 shows the changes in economic impacts supported by the cargo handled at the PHA owned and leased marine terminals.

Exhibit E-4
Comparison of Direct Economic Impacts: 2022-2025
Port of Houston Authority Terminals Only

	PHA Terminals 2025	PHA Terminals 2022	Change
JOBS			
Direct	29,361	30,161	-799
Induced	45,307	52,705	-7,398
Indirect	21,646	26,494	-4,847
<i>Subtotal</i>	<i>96,314</i>	<i>109,360</i>	<i>-13,045</i>
Related	<u>1,007,734</u>	<u>870,135</u>	<u>137,599</u>
Total	1,104,048	979,495	124,554
PERSONAL INCOME(MILLIONS)			
Direct	\$2,621	\$2,494	\$127
Re-spending/Local Personal Consumption	\$8,594	\$7,743	\$851
Indirect	\$875	\$1,071	-\$196
<i>Subtotal</i>	<i>\$12,090</i>	<i>\$11,308</i>	<i>\$782</i>
Related	<u>\$59,810</u>	<u>\$69,990</u>	<u>-\$10,180</u>
Total	\$71,901	\$81,298	-\$9,398
TOTAL ECONOMIC VALUE (MILLIONS)			
Direct Business Revenue	\$8,909	\$9,036	-\$126
Re-spending/Local Personal Consumption	\$8,594	\$7,743	\$851
Related Output	<u>\$246,497</u>	<u>\$245,175</u>	<u>\$1,322</u>
Total Economic Value	\$264,001	\$261,953	\$2,047
LOCAL PURCHASES (MILLIONS)	\$2,534	\$2,774	-\$240
STATE/LOCAL TAXES (MILLIONS)			
Direct	\$272	\$217	\$55
Induced	\$816	\$674	\$143
Indirect	\$83	\$93	-\$10
<i>Subtotal</i>	<i>\$1,172</i>	<i>\$984</i>	<i>\$188</i>
Related	<u>\$6,323</u>	<u>\$6,089</u>	<u>\$234</u>
Total	\$7,495	\$7,073	\$422

Totals may not add due to rounding

Since 2022, the overall jobs supported by the cargo moving via the PHA owned and leased facilities grew by 124,554 total direct, induced, indirect, and related jobs. The direct jobs generated by the PHA owned and leased marine terminals fell by 799 jobs, primarily reflecting the loss of steel imports and auto imports. The growth of direct jobs generated by the increase in containerized cargo tonnage mitigated the loss in direct jobs due to the decline in steel imports, auto imports and dry bulk imports and exports. Induced jobs declined by 7,398 jobs reflecting the contraction of induced jobs generated by one dollar of re-spending and less direct jobs. Indirect jobs fell by 4,847 jobs, as the result of the reduction in local purchases, as well as the contraction of the jobs generated per dollar of purchases. As the result of the growth in containerized cargo handled at PHA facilities, an additional 137,599 user jobs were supported by the activity at the PHA terminals, reflecting the growing sphere of influence of the Port of Houston to serve importers/exporters in Texas that were previously served via out of state ports.

The overall economic value in the State that the cargo handled at the PHA facilities increased by \$2.0 billion and the state and local taxes supported by the cargo operations at the PHA facilities increased by \$422 million since 2022.

In summary, the public and private marine terminals at the Port of Houston continue to be an economic engine for the Houston area, Harris County and the state of Texas. The importance of the port's public and private marine terminals to the state is underscored by the fact that the total value of the economic impact of the public and private marine terminals is measured at \$537.7 billion in terms of total economic value to the state in 2025 and 1,886,172 jobs in the state of Texas are supported by the marine activity at the public and private terminals along the Houston Ship Channel.

I. OVERVIEW OF THE ANALYSIS AND SUMMARY OF RESULTS

Martin Associates was retained by the Port of Houston Authority of Harris County, Texas (“PHA”) to measure the local and regional economic impacts generated by cargo and vessel activity at the Port of Houston Authority's marine terminals, including Houston Public Grain Elevator #2, Fentress Bracewell Barbours Cut Container Terminal, Bayport Container Terminal, Bulk Materials Handling Plant, Jacintoport, Care Terminal, the PHA Terminals in the Houston Turning Basin and the Woodhouse Terminal, as well as the impacts generated at the private marine terminals along the Houston Ship Channel, which include petroleum refineries, petrochemical plants, general cargo facilities (e.g., Manchester Terminal, Greensport, Texas Terminals, etc.) and dry bulk terminals. Impacts are estimated in terms of jobs, personal earnings, business revenue and state and local taxes, resulting from marine cargo and vessel activity in 2025. In addition to quantifying the baseline impacts of the Port of Houston Authority's marine terminals and the impacts of the private marine terminals, two economic impact models have been developed – one specifically for the PHA's marine terminals and the other for the combined activity at private marine terminals and the PHA- owned or leased terminals. These models can be used in evaluating the sensitivity of impacts to changes in tonnage, labor productivity, labor work rules, commodity mix, inland origins/destinations of commodities and vessel size. The models can also be used to evaluate the impacts of new terminal development and channel dredging and widening, as well as for annual updates.

The methodology used in this analysis has been developed by Martin Associates and has been used to estimate the economic impacts of seaport activity at public and private marine terminals of more than 500 United States and Canadian ports. This study is essentially an update of the economic impact study conducted for the Port of Houston Authority in 2022. With respect to other Texas ports, Martin Associates has developed economic studies for the Ports of Brownsville, Beaumont, Port Arthur, Harlingen, Orange, Victoria, Texas City, Corpus Christi, Freeport, Galveston and Port LaVaca-Point Comfort. Martin Associates has also developed the statewide economic impact model for the state of Texas. The methodology has been used in studies that have been presented before the International Trade Commission, the Council of Economic Advisors, the Federal Reserve Board, the Canadian Justice Department and several U.S. Presidents.

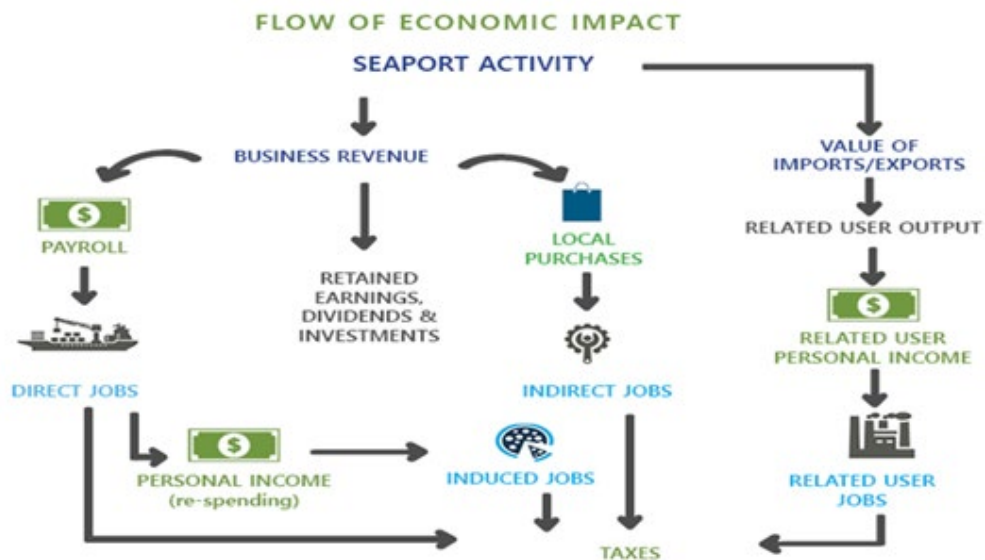
The remainder of this chapter presents an overview of the economic impact analysis and consists of the following sections:

- Flow of economic impacts through the local and regional economies
- The structure of the impact analysis
- Summary of the methodology
- Commodities included in the analysis

1. FLOW OF IMPACTS

Waterborne activity at a seaport contributes to the local and regional economy by generating business revenue to local and national firms providing vessel and cargo handling services at the marine terminals. These firms, in turn, provide employment and income to individuals and pay taxes to state and local governments. Exhibit I-1 shows how activity at marine terminals generates impacts throughout the local, state, and national economies. As this exhibit indicates, the impact of a seaport on a local, state or national economy cannot be reduced to a single number, but instead, the seaport activity creates several impacts. These are the revenue impact, employment impact, personal income impact and tax impact. These impacts are non-additive. For example, the income impact is a part of the revenue impact and adding these impacts together would result in double counting. Exhibit I-1 shows graphically how activity at the PHA's marine terminals and private marine terminals generates the four impacts.

Exhibit I-1
Flow of Economic Impacts Generated by Marine Activity



1.1 Business Revenue Impact

At the outset, activity at the port generates business revenue for firms which provide services. This business revenue impact is dispersed throughout the economy in several ways. It is used to hire people to provide the services, to purchase goods and services and to make federal, state and local tax payments. The remainder is used to pay stockholders, retire debt, make investments or is held as retained earnings. It is to be emphasized that the only portions of the revenue impact that can be definitely identified as remaining in the local economy are those portions paid out in salaries to local employees, for local purchases by individuals and businesses directly dependent on the seaport, in contributions to state and local taxes, in lease payments to the Port of Houston Authority by tenants and wharfage and dockage fees paid by the steamship lines to the Port of Houston Authority and the privately owned and operated terminals along the Houston Ship Channel.

1.2 Employment Impact

The employment impact of seaport activity consists of four levels of job impacts:

- Direct employment impact – jobs directly generated by seaport activity. Direct jobs generated by marine cargo include jobs with railroads and trucking companies moving cargo between inland origins and destinations and the marine terminals, longshoremen and dockworkers, steamship agents, freight forwarders, stevedores, etc. It is to be emphasized that these are classified as directly generated in the sense that these jobs would experience near term dislocation if the activity at the PHA marine terminals or private terminals were to be discontinued.
- Induced employment impact – jobs created throughout the local economy because individuals directly employed due to seaport activity spend their wages locally on goods and services such as food, housing and clothing. These jobs are held by residents located throughout the region, since they are estimated based on local and regional purchases.
- Indirect employment impact – jobs created locally due to purchases of goods and services by firms, not individuals. These jobs are estimated directly from local purchases data supplied to Martin Associates by more than 1,000 companies included in this study and include jobs with local office supply firms, maintenance and repair firms, parts and equipment suppliers, etc. It is to be emphasized that special care was taken to avoid double counting, since the current study counts certain jobs as direct (i.e., trucking jobs, jobs with railroads, jobs with insurance companies and admiralty law firms, etc.) which are often classified as indirect by other approaches, notably the input/output model approach.

- Related jobs are jobs that are determined to be related to physical cargo that is exported and imported via the Port of Houston public and private marine terminals in 2025. These jobs include the portion of jobs at importing and exporting firms that are directly associated with the cargo moved via the Port of Houston marine terminals. See “related user impacts” below for more details.

1.3 Personal Income Impact

The personal income impact is the measure of employee wages and salaries (excluding benefits) received by individuals directly employed due to seaport activity. Re-spending of these earnings throughout the regional economy for purchases of goods and services is also estimated. This, in turn, generates additional jobs – the induced employment impact. This re-spending throughout the region is estimated using a regional personal earnings multiplier, which reflects the percentage of purchases by individuals that are made within the Houston region. The re-spending effect varies by region – a larger re-spending effect occurs in regions that produce a relatively large proportion of the goods and services consumed by residents, while lower re-spending effects are associated with regions that import a relatively large share of consumer goods and services (since personal earnings “leak out” of the region for these out-of-regional purchases). The direct earnings are a measure of the local impact since they are received by those directly employed by seaport activity.

1.4 Tax Impact

Tax impacts are tax payments to the state and local governments by firms and by individuals whose jobs are directly dependent upon and supported (induced and indirect jobs) by activity at the marine terminals.

1.5 Related User Impacts

In addition, the direct, induced and indirect impacts also support activity with regional exporters and importers using the Port of Houston’s public and privately owned marine terminals. These impacts are classified as ***related user impacts*** in that the exporters and importers using the marine terminals can and do use other ports for the shipment and receipt of cargo. The related impacts measure the impact, or influence, of the port’s marine terminals at a given point in time and if the port’s terminals were no longer used, these influenced users would use other ports to export and import cargo. Unlike the direct, induced and indirect impacts, the related impacts would not necessarily be dislocated from the economy – instead, the impacts would no longer be influenced by the Port of Houston, but by another port. It is emphasized that only the portion of jobs, income taxes and revenue related to the actual cargo moving via the Port of Houston public and private marine terminals is counted in the related user impacts.

Finally, the direct, induced and indirect port sector job, income, revenue and tax impacts associated with each of the cargoes for which related shipper/consignee impacts were estimated were subtracted from the total related impacts (by commodity and cargo type). This was done to avoid double counting, as the related shipper/consignee impacts include impacts at each logistical stage of handling the imported and exported cargo, such as the port activity and the trucking and rail activity to move the cargo to and from each port and the induced and indirect jobs associated with the direct port activity.

2. IMPACT STRUCTURE

The four types of economic impacts are created throughout various business sectors of the state and local economies. Specifically, four distinct economic sectors are impacted as a result of activity at the marine terminals. These are the:

- Surface Transportation Sector
- Maritime Services Sector
- Shippers/Consignees using the Port
- Port of Houston Authority

Within each sector, various participants are involved. Separate impacts are estimated for each of the participants. A discussion of each of the economic impact sectors is provided below, including a description of the major participants in each sector.

2.1 The Surface Transportation Sector

The surface transportation sector consists of both the railroad and trucking industries. The trucking firms and railroads are responsible for moving the various cargoes between the marine terminals and the inland origins and destinations.

2.2 The Maritime Services Sector

This sector consists of numerous firms and participants performing functions related to the following maritime services:

- Cargo Marine Transportation
- Vessel Operations
- Cargo Handling
- Federal, State and Local Government Agencies

A brief description of the major participants in each of these four categories is provided below:

- Cargo Marine Transportation - Participants in this category are involved in arranging for inland and water transportation for export or import freight. The freight forwarder/customhouse broker is the major participant in this category. The freight forwarder/customhouse broker arranges for the freight to be delivered between the terminals and inland destinations, as well as the ocean transportation. This function performed by freight forwarders and customhouse brokers is most prevalent for general cargo commodities.
- Vessel Operations - This category consists of several participants. The steamship agents provide a number of services for the vessel as soon as it enters the port; the agents arrange for pilot services and towing, for medical and dental care of the crew and for ship supplies. The agents are also responsible for vessel documentation. In addition to the steamship agents arranging for vessel services, those providing the services include:
 - Chandlers - supply the vessels with ship supplies (food, clothing, nautical equipment, etc.)
 - Towing firms - provide the tug service to guide the vessel to and from port; these firms sometimes are involved in domestic barge operations
 - Pilots - assist in navigating the vessels along the Houston Ship Channel to and from the PHA marine terminals and private marine terminals
 - Bunkering firms - provide fuel to the vessels
 - Marine surveyors - inspect the vessels and the cargo
 - Shipyards/marine construction firms - provide repairs, either emergency or scheduled as well as marine pier construction and dredging
- Cargo Handling - This category involves the physical handling of the cargo at the terminals between the land and the vessel. Included in this category are the following participants:
 - Longshoremen - include members of the International Longshoremen's Association (ILA), as well as non-ILA dockworkers that are involved in the loading and unloading of cargo from the vessels, as well as handling the cargo prior to loading and after unloading.

- Stevedoring firms - manage the longshoremen and cargo-handling activities. Stevedoring services at the Port of Houston Authority terminals are provided by private stevedoring companies.
- Terminal operators - are often stevedoring firms who operate the maritime terminals where cargo is loaded and off-loaded.
- Warehouse operators - store cargo after discharge or prior to loading and consolidate cargo units into shipment lots.
- Government Agencies - This service sector involves federal, state and local government agencies that perform services related to cargo handling and vessel operations at the Port. U.S. Customs, Bureau of Immigration, U.S. Department of Labor, U.S. Department of Agriculture, U.S. Coast Guard, the Army Corps of Engineers and U.S. Department of Commerce employees are involved. These services are provided by the government offices located in the Houston area.

2.3 Banking/Law Sector

While this service sector is not directly involved in cargo or ship operations, it nonetheless does provide services such as financing export/import transactions and insuring cargo and vessels. Also included in this sector are legal firms specializing in maritime law.

2.4 Shippers/Consignees

Two categories of shippers and consignees are considered in the analysis: those that are totally dependent on the public and privately-owned marine terminals and those located throughout the regional economy whose business is only related to the port. Those in the first category would most likely shut down operations if the marine terminals were not available for their use, while those in the second category would ship or receive materials via another port. Related jobs consist of jobs with steel fabrication firms, users and producers and consumers of containerized cargo and breakbulk cargo and farmers producing the grain for export. Dependent shippers/consignees include employees of the oil refineries and petrochemical plants that are dependent upon the receipt of crude and chemicals by vessel/barge and the shipment of refined product by vessel/barge, as well as plants on the Houston Ship Channel that are dependent upon the receipt or shipments of steel products and other miscellaneous breakbulk cargoes. For this current study, the majority of shippers and consignees are with petrochemical plants, fertilizer operations and petroleum refineries.

2.5 Port of Houston Authority

The Port of Houston Authority (PHA) sector includes those individuals employed by the Port of Houston Authority whose purpose is to oversee port activity at the PHA owned and operated marine terminals, PHA leased marine terminals and other PHA marine terminals.

3. SUMMARY OF METHODOLOGY

The purpose of this section is to provide a summary of the methodological approach used to estimate the economic impacts of the vessel and cargo activity at the public and private terminals at the Port of Houston.

3.1 Data Collection

The cornerstone of the Martin Associates' approach is the collection of detailed baseline impact data from firms providing services at the PHA marine terminals and the private terminals. To ensure accuracy and defensibility, the baseline impact data were collected from more than 1,000 firms in the Houston maritime community. These firms provide services at the Port of Houston's public and private marine terminals located along the Houston Ship Channel, as identified by:

- PHA's internal customer and tenant lists
- Houston Ship Channel Security Directory
- The Port of Houston, Port Directory
- Prior economic impact studies conducted by Martin Associates for the Port of Houston Authority

3.2 Direct Jobs, Income and Revenue Impacts

The results of these interviews were then used to develop the baseline direct job, revenue and income impacts for the economic sectors and job categories associated with the PHA's marine terminals, as well as the private terminals.

The direct tax impacts are estimated at a state, county and local level based on per capita income tax burdens published by the Tax Foundation and Tax Policy Council, as well as data collected from the U.S. Bureau of Census, State and Local Government Finances.

This baseline survey data was also used to develop operational models which can be used to update the impacts of the Port of Houston Authority's marine terminals and private terminals on an annual basis and to evaluate the impacts of changes in:

- Marine cargo tonnage, by commodity
- Seaport labor productivity and work rules
- Modal distribution of seaport cargo (what percent of the inland transportation of a commodity is truck versus rail), as well as the geographical distribution of each commodity
- Vessel calls and vessel size
- New carrier services

Also, the operational models can be used to evaluate alternative facilities expansion projects and new marine terminal construction, as well as the impacts associated with channel dredging and widening.

3.3 Induced Impacts

Induced impacts are those generated by the purchases of the individuals employed as a result of seaport activity. For example, a portion of the personal earnings received by those directly employed due to activity at the marine terminals is used for purchases of goods and services, both regionally, as well as out-of-the region. These purchases, in turn, create additional jobs in the region which are classified as induced. To estimate these induced jobs, a regional personal earnings multiplier was developed from data provided by the Bureau of Economic Analysis, Regional Income Division. This personal earnings multiplier is used to estimate the total personal earnings generated in the Houston area as a result of the activity at the Port of Houston Authority's marine terminals and at private marine terminals. A portion of this total personal earnings impact is next allocated to specific local purchases (as determined from consumption data for Houston residents, as developed from the U.S. Bureau of Labor Statistics, Consumer Expenditure Survey). These purchases are next converted into retail and wholesale induced jobs in the regional economy.

Induced jobs are not estimated at lower levels of purchasing rounds (after the wholesale round) since it is not possible to trace with a sufficient degree of accuracy, geographically, where purchases at the remaining levels occur. However, about 80 percent of the consumption will likely occur at the first two rounds of purchases, which are most likely local retail and wholesale purchases.

3.4 Indirect Impacts

Indirect impacts include indirect jobs, personal income and state and local taxes. These indirect impacts are generated in the local economy as the result of purchases by firms that are directly dependent upon cargo and vessel activity at the marine terminals, including the shippers/consignees located along the Houston Ship Channel. These purchases are for goods and services such as office supplies and equipment, maintenance and repair services, communications and utilities, transportation services and other professional services. To estimate the indirect economic impact, local purchases, by type of purchase, were collected from each of the firms interviewed. These local purchases were then

combined with employment to sales ratios in local supplying industries, developed from the U.S. Bureau of Economic Analysis Regional Input-Output Modeling System (RIMSII) for the Houston region. The indirect job ratios also account for the in-state spin-off effects from multiple rounds of supply chains that are required to provide the locally purchased goods and services.

3.5 Related Impacts

Related impacts measure the jobs, income, revenue and state and local taxes with shippers and consignees moving cargo through the PHA's marine terminals and private terminals. These jobs are classified as related jobs, since the firms using the marine terminals for the movement of cargo can and do use other seaports and marine terminals. For example, firms importing or exporting containerized cargo typically select a steamship line rather than the seaport through which the cargo will move and the port through which the containerized cargo moves is ultimately determined by the steamship line's port call rotation. Similarly, exporters of breakbulk cargo often use freight forwarders, who in turn choose the port of export. Importers of breakbulk cargo often use several ports for the import of cargo, based on market locations. Because of the proximity of other ports and the associated steamship service at these ports, such as Freeport, Galveston, Corpus Christi, New Orleans, as well as West Coast Ports (competing for the Far East land bridge cargo) to the Port of Houston's marine terminals, importers as well as exporters of containers, breakbulk and bulk cargo have some flexibility in port choice. As a result, jobs with these exporters and importers cannot be counted as dependent upon the public and private marine terminals.

These jobs are estimated based on the value per ton of the commodities exported and imported only via the Port of Houston and the associated jobs to value of output ratios for the respective producing and consuming industries located in the state. The value per ton of each of the key commodities moving via the Port of Houston was developed from the U.S. Census Bureau, USA Trade On-Line. The average value per ton for each commodity moving over the PHA and private marine terminals was then multiplied by the respective tonnage moved in 2022. Ratios of jobs to value of output for the corresponding consuming and producing industries were developed by Martin Associates from the U.S. Bureau of Economic Analysis, Regional Input-Output Modeling System for the state of Texas. These jobs to value co-efficient include the in-state, spin-off impacts that would occur in order to produce the export commodity or use the import commodity in production. The percent of each commodity that is produced or consumed in the state of Texas was next developed from the interviews and the value of each commodity remaining in the state of Texas was calculated. The ratios of jobs to value of export or import cargo were then combined with the in-state value of the respective commodities moving via the PHA terminals and private terminals to estimate related jobs and the spin-off jobs in-state to support the export and import industries. Similarly, the respective income and output multipliers were used to estimate the related personal income impact as well as the total value of economic output and taxes generated by the Port of Houston public and private marine terminals. It is to be emphasized that care was taken to control for double counting of the direct, induced and indirect impacts.

4. COMMODITIES INCLUDED IN THE ANALYSIS

A major use of an economic impact analysis is to provide a tool for port development planning. As a port grows, available land and other resources for port facilities become scarce and decisions must be made as to how to develop the land and utilize the resources in the most efficient manner. Various types of facility configurations are associated with different commodities. For example, containers require a large amount of paved, open storage space, while certain types of dry bulk cargo require covered storage and special dust removing equipment.

An understanding of the commodity's relative economic value in terms of employment and income to the local community, the cost of providing the facilities and the relative demand for the different commodities is essential in making future port development plans. Because of this need for understanding relative commodity impacts, economic impacts are estimated for the following commodities handled at the public and private marine terminals:

- | | |
|-----------------------|---------------------------|
| • Containerized cargo | • Miscellaneous breakbulk |
| • Autos | • Fertilizer |
| • RoRo | • Dry bulk |
| • Steel products | • Grain |
| • Bagged cargoes | • Liquid bulk |
| • Forest products | • Petroleum |

It should be emphasized that commodity-specific impacts are not estimated for each of the economic sectors described in the last section. Specific impacts by commodity could not be allocated to individual commodities with any degree of accuracy for the banking/insurance/law sector and marine construction sector. In addition, taxes have not been displayed by specific commodities since these tax impacts will reflect the same distribution over commodities as the employment impact.

II. EMPLOYMENT IMPACTS

In this chapter, the employment generated by maritime activity at the public and private marine terminals along the Houston Ship Channel is estimated. The chapter is organized as follows:

- First, the total employment that is in some way related to the activities at the public and private marine terminals is estimated.
- Second, the subset of total employment that is judged to be totally dependent (i.e., direct jobs) on port activity is analyzed as follows:
 - The direct job impact is estimated in terms of key economic sectors, i.e., surface transportation sector, maritime services sector, shippers/consignees sector and Port of Houston Authority sector.
 - The direct job impact is estimated by detailed job category, i.e., trucking, ILA/dockworkers, freight forwarders/customhouse brokers, steamship agents, chandlers, warehousemen, stevedores and terminal operators, surveyors, etc.
 - The direct job impact is estimated for each of the key commodities/commodity groups.
 - The direct job impact is estimated based on the residency of those directly employed.
- Induced and indirect jobs are estimated.
- Finally, jobs related to the marine activity at the public and private marine terminals are described.

1. TOTAL EMPLOYMENT IMPACT

It is estimated that 1,886,172 Texas jobs are in some way related to port activities at the public and private marine terminals along the Houston Ship Channel. Of the 1,886,172 jobs held by Texas residents:

- 92,330 jobs are directly generated by activities at the public and private marine terminals and if such activities should cease, these jobs would be discontinued over the short term.

- 146,427 jobs (induced jobs) are supported by the local purchases of the 92,330 individuals directly generated by port activity at the marine terminals. An additional 68,069 indirect jobs were generated due to \$8.0 billion of purchases in the local and regional economy by firms providing direct cargo handling and vessel services and by the directly dependent shippers/consignees located along the Houston Ship Channel.
- An additional 1,579,345 Texas jobs are with exporters and importers located in Texas that ship cargo via the public and private marine terminals. These jobs are estimated based on the actual volume and value of the containerized cargo, breakbulk cargo and dry and liquid bulk cargo moving via the Port of Houston marine terminals. These jobs are considered to be related to activities at the public and private marine terminals, but the degree of dependence on these terminals is difficult to estimate. It is to be emphasized that the level of employment with these exporters and importers is based on the demand for the final product, i.e., imported retail commodities such as electronics and computer equipment, not by the actual use of the marine terminals along the Houston Ship Channel. However, if other ports were used, it is likely that the costs of importing and exporting would increase, which could have long run implications on the level of employment with the related shippers/consignees. Finally, it is to be emphasized that there is no double counting of the directly dependent shippers/consignees in this related job estimate.

2. DIRECT JOB IMPACTS

In 2025, 289.5 million tons of domestic and foreign waterborne cargo moved via the public and private marine terminals³. As a result of this activity, 92,330 full-time jobs were directly created⁴. In this section the jobs are analyzed in terms of:

- Distribution by economic sector
- Distribution by job category
- Distribution by commodity group
- Distribution by county and state of residency

³Total tonnage is estimated based on actual 2025 tonnage data at the Port of Houston Authority terminals. For the domestic and international cargo handled at the private terminals, a combination of sources was used to estimate the 2025 tonnage, including interviews with the private terminals; a review of the U.S. Army Corps of Engineers, Waterborne Commerce Statistics (2023 data for domestic trade which is latest published); S&P Transearch data for domestic waterborne shipments and receipts; and 2025 USA Trade OnLine, U.S. Bureau of Census.

⁴Jobs are measured in terms of full-time worker equivalents. If a worker is employed only 50 percent of the time by activity at the Port of Houston public and private marine terminals, then this worker is counted as 0.5 jobs.

2.1 Job Impacts by Sector and Job Category

Exhibit II-1 presents the distribution of the 92,330 direct jobs by sector and job category. As this exhibit shows, the largest job impacts are with shippers and consignees dependent upon the cargo moving via the terminals along the Houston Ship Channel. These jobs are concentrated with the refineries and petrochemical facilities moving the liquid bulk cargoes through the marine terminals (85% of the jobs in this sector), followed by dependent shippers/consignees handling containerized cargo. The dependent shippers/consignees generated by the containerized cargo consist primarily of distribution centers located near the Port handling transload activity and distribution to regional distribution centers; also included are the dependent shippers/consignees handling packaging of resins for export via container. Of the 11,315 terminal and dockworkers workers, about 4,330 were members of International Longshormen's Association (ILA). About 87 percent of the ILA jobs were employed by handling containerized cargo, followed by the handling of steel products. About 45 percent of the terminal jobs excluding the ILA are employed by the marine terminal operations of petrochemical plants and refineries. The majority of warehousing jobs is created by containerized cargo and includes jobs with container freight station operations, container repair operations, transload operations and distribution centers dependent on import and export containers moving via the port's marine terminals.

Exhibit II-1
Direct Employment Impacts by Job Category

JOB CATEGORY	PHA	PRIVATE	TOTAL
SURFACE TRANSPORTATION			
Rail	210	912	1,122
Truck	6,968	6,768	13,735
MARITIME SERVICES			
Terminal/ILA/Dockworkers	6,193	5,122	11,315
Tug Assist	48	189	237
Pilots	34	133	167
Agents	964	620	1,584
Maritime Services	567	5,173	5,741
Forwarders	1,289	22	1,311
Warehouse/Container Repair	4,107	568	4,675
Marine Construction/Ship Repair	1,260	946	2,206
Government	39	540	578
Linehaul Barge/Bunkering	228	1,553	1,781
DEPENDENT SHIPPERS/CONSIGNEES	6,406	37,534	43,941
BANKING/ADMIRALTY LAW	207	2,888	3,096
PORT OF HOUSTON AUTHORITY	841		841
TOTAL	29,361	62,969	92,330

Totals may not add due to rounding

2.2 Direct Job Impacts by Commodity

Most of the 92,330 jobs considered to be generated by port activity can be related to the handling of specific commodities or commodity groups. Certain employment categories such as government employees, employees with marine construction and ship repair, banking and admiralty law firms and the miscellaneous maritime services firms cannot be identified with a specific commodity. As a result, employment in these groups (which totaled 10,477 jobs) was not allocated to commodity groups.

Exhibit II-2 presents the direct employment impacts in terms of commodity groups. This exhibit indicates that in 2025, liquid bulk handled at the private terminals generated the largest number of direct jobs, 52,344. The majority of these jobs are with refineries and petrochemical facilities along the Houston Ship Channel directly dependent upon the shipment and receipt of petroleum and petrochemicals via the Port of Houston. The movement of containerized cargo, accounting for 20,087 direct jobs. The majority of these jobs are with trucking; warehouse/container repair and CFS operations; members of the International Longshoremen's Association; and dependent shippers/consignees. The import of steel products generated 3,350 direct jobs; the majority of the jobs were generated with terminal operations/ILA/dockworkers; dependent shippers/consignees; trucking firms; and freight forwarders. Other Dry bulk cargo generated 2,439 direct jobs concentrated with dependent shippers/consignees and trucking, while miscellaneous breakbulk cargo generated 2,098 direct jobs, the majority of which are with warehousing, trucking, forwarding and the ILA.

Exhibit II-2
Distribution of Direct Job Impact by Commodity

COMMODITY TYPE	TOTAL JOBS
Containers	20,087
Autos/RoRo/Project Cargo	772
Steel	3,350
Bagged Cargoes	259
Forest Products	71
Miscellaneous Breakbulk	2,098
Bulk Grain	433
Other Dry Bulk	2,439
Petroleum (Crude and Products)	18,381
Other Liquid Bulk	33,963
Not Allocated	10,477
Total	92,330

Totals may not add due to rounding.

2.3 Job Impacts per Ton

The assessment of the job impacts on a per 1,000-ton basis provides a tool for port planners to use in evaluating the relative importance of different commodities as economic generators. Exhibit II-3 presents the job impacts per 1,000 tons for each commodity moving via the public and private marine terminals.

Exhibit II-3
Job Impacts per 1,000 Tons

COMMODITY TYPE	TOTAL
Containers	0.50
Autos/RoRo/Project Cargo	7.16
Steel	0.70
Bagged Cargoes	1.72
Forest Products	0.26
Miscellaneous Breakbulk	1.59
Bulk Grain	0.07
Other Dry Bulk	0.31
Petroleum (Crude and Products)	0.12
Other Liquid Bulk	0.48

The movement of RoRo cargo such as agricultural equipment, project cargo and road working equipment generates the greatest number of direct jobs per 1,000 tons, followed by the movement of breakbulk cargo and bagged cargo. However, the volume of autos/RoRo and project cargo, as well as bagged cargo was relatively small in 2025, which tends to distort the jobs to 1,000-ton metrics in 2025.

In 2025, about 2.5 million containers moved via the Port of Houston. Based on this volume, every 1,000 container moves handled at the Port of Houston generates about 8.2 direct jobs.

Despite the fact that petroleum and petroleum products generated the largest direct job impact, on a per 1,000-ton basis, crude petroleum and petrochemicals generated an average of 0.23 jobs per 1,000 tons, reflecting the high volume of liquid bulk cargo moving via the refineries, and petrochemical terminals located within the Port of Houston.

It is important to emphasize that these jobs per 1,000-ton ratios are static ratios and should not be used to extrapolate increases in tonnage into increases in direct jobs. The relationship between tonnage increases and jobs is not linear, since certain jobs are fixed with respect to waterborne tonnage.

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To estimate changes in direct jobs due to tonnage changes, the Martin Associates' Port of Houston Impact model should be used, as this is the designed purpose of the model.

2.4 Distribution of Direct Jobs by Place of Residence

To underscore the geographic scope of the impacts generated by the public and private marine terminals, Exhibit II-4 presents the distribution of the 92,330 direct jobs less the direct trucking jobs (13,735 direct jobs) by place of residence⁵. The residence analysis is based on the results of the interviews with the service providers. As this exhibit indicates, 73 percent of the direct jobs are held by residents of Harris County, including Houston, Pasadena, Bayport, La Porte, and other communities in that county. About 6 percent of the direct jobs are held by residents of Brazoria County and Galveston County respectively.

Exhibit II-4
Distribution of Direct Jobs by Place of Residency

JURISDICTION	SHARE	DIRECT JOBS
MUNICIPALITIES		
Houston	26.82%	21,081
Pasadena	2.99%	2,352
LaPorte	2.38%	1,874
Baytown	2.57%	2,019
Seabrook	0.57%	451
Deer Park	0.82%	646
Galena Park	0.38%	301
Channel View	0.45%	358
Brookshire	1.60%	1,259
Katy	0.92%	725
Conroe	0.44%	348
COUNTIES		
Other Harris	36.29%	28,524
Chambers	0.78%	617
Other Fort Bend	1.69%	1,328
Other Montgomery	2.67%	2,098
Other Waller	0.01%	8
Brazoria	6.22%	4,887
Galveston	5.91%	4,648
Other Texas	2.48%	1,948
Other U.S.	3.98%	3,126
TOTAL	100.00%	78,595

Totals may not add due to rounding

3. INDUCED JOBS

⁵ Residence of trucking jobs cannot be identified defensibly due to the nature of the trucking services provided by a large number of owner operators as well as the inability to survey directly the actual individual truckers and support operations involved in moving cargo to and from the public and private marine terminals.

The 92,330 directly employed individuals due to activity at the public and private marine terminals received wages and salaries, a part of which was used to purchase local goods and services such as food, housing, clothing, transportation services, etc. As a result of these local purchases, 146,427 jobs in the regional economy were supported. The majority of the induced jobs are with state and local government agencies providing education, police and fire protection, other community and social services, as well as firms providing business and personal services. The next largest induced job impact occurs in the local food industry (restaurant and groceries), where nearly 25,000 jobs are supported, followed by housing.

4. INDIRECT JOBS

In addition to the induced jobs generated by the purchases of 92,330 directly employed individuals, the firms providing the direct services and employing the 92,330 direct jobs make local purchases for goods and services. These local purchases by the firms dependent upon the public and private marine facilities generate additional local jobs – indirect jobs. Based on interviews with the port service providers and terminal operators, these firms made \$8.0 billion of local purchases in 2025. These direct local purchases created an additional 68,069 indirect jobs in the local economy. These purchases include expenditures for equipment and parts, maintenance and repair services, office supplies, raw materials, fuel, and utilities. Care is taken to avoid any double counting of jobs already included in direct jobs.

5. RELATED JOBS

It is estimated that about 1,579,345 jobs with Texas companies using the port to ship and receive waterborne cargo are classified as related to the public and private marine terminals. These jobs are with producers and consumers of containerized cargo, producers and consumers of the liquid and dry bulk cargoes moving through the public and private marine terminals, importers using steel imports for fabrication and construction activity and farmers producing grain and rice for export. Of the 1,579,345 user jobs supported by the shipment and receipt of cargo through the public and private marine terminals, 883,000 are supported by containerized cargo, followed by 558,000 jobs supported in Texas by the shipment and receipt of petroleum and petrochemical products through the private and public marine terminals. Imported steel products supported 113,500 jobs throughout the state.

To estimate the related user jobs with importers/exporters and those industries supporting the production of the container exports and the consumers of the containerized imports moving via Port of Houston container terminals, the following methodology was used. First, the key cargoes within the containers moving via the Port of Houston were identified from USA Trade OnLine. The majority of imported containerized cargo consists of electronics, beverages, iron and steel products and chemicals.

For export containers, key commodities include plastics, chemicals and machinery and equipment. The average value per ton of each commodity was also developed from the USA Trade OnLine database.

An average value per ton of containerized cargo imports and exports handled at the port was then estimated.

Export producing industries were identified for the key commodities moving in the export containers via the port's container terminals. Similarly, the cargo moving in the imported containers was also associated with the producing industries or retail/wholesale activity. Using the Bureau of Economic Analysis, RIMS II model for the state of Texas, jobs to value of output ratios were developed for the relevant export producing and import consuming sectors. For imported goods associated with wholesale/retail operations, the average retail margins were applied to the value of the imported containerized cargo associated with retail operations. The values of import and export containers moving via the port were next estimated by multiplying the value per container (export and import separately) by the number of full containers moved via the container terminals. The total values of each type of container moved via the port were then adjusted to reflect the percentage of containers originating or destined for Texas, as determined from the terminal operators and steamship lines.

About 85 percent of the containerized cargo imported and exported via the Port of Houston is estimated to originate or be consumed in Texas. Combining this share with the value of export and import containers and the relevant jobs to value of shipment ratios, it is estimated that about 883,00 jobs are with in-state users of the Port of Houston for the shipment and receipt of containerized cargo. Included in this related job estimate are not only the jobs with the importers and exporters and the induced and indirect jobs created by these jobs, but the jobs required to support the production of the exports as well as the distribution and use of the imports are also included in the related user job impacts. A similar method was used to estimate jobs related to forest products, grain and liquid and dry bulk cargoes. The impact of imported steel in the local construction and fabrication industries was estimated in a similar method, combining the value of the imported steel via the port that is estimated to remain in Texas (determined through terminal interviews) with the construction and fabrication employment to output coefficients developed from the U.S. Bureau of Economic Analysis.

On a national basis the cargo shipped and received via the petroleum and petrochemical complexes along the ship channel has a significantly larger related user impact, due to the fact that more than 50% of the liquid bulk and petroleum products move outside the state of Texas.

It is to be emphasized that these are related jobs and would not likely disappear if the marine terminals along the Houston Ship Channel would close to marine cargo activity. Given a level of demand for containerized cargo, steel, petrochemical cargo, the cargo would be shipped through another port such as Galveston, Corpus Christi, New Orleans or Los Angeles/Long Beach. The directly dependent shipper/consignee impacts especially those with the petroleum and petrochemical complexes using the marine terminals and the distribution centers and packaging facilities handling containerized cargo that are located near the port's container terminals, as well as direct, induced and indirect jobs associated with these cargoes, are not included in these related job estimates.

It is to be further emphasized that when the impact models are used for planning

purposes and sensitivity analysis, related jobs should not be used to judge the economic benefits of a particular project. Related jobs are not estimated with the same degree of defensibility as are the direct, induced and indirect jobs. Therefore, these three types of job impacts should be used in evaluating port investments. The purpose of the related jobs estimates is to provide a proxy for the magnitude of the more general economic development impact supported by the private and public port facilities at a specific point in time. It is the ultimate demand for the products moving via the Port of Houston public and private marine terminals that generate the impacts with the related users.

III. REVENUE, INCOME, AND TAX IMPACTS

The 289.5 million tons of cargo at the Port of Houston's private and public marine terminals generated revenue for firms in each of the economic sectors. For example, revenue is received by the railroads and the trucking companies within the surface transportation sector as a result of moving export cargo to the marine terminals and distributing the imported commodities inland after receipt at the marine terminals. The firms in the maritime services sector receive revenue from arranging for transportation services, cargo handling, providing services to vessels in port and repairs to vessels calling the port facilities. The banking/insurance sector receives revenue from financial services provided to users of the marine terminals. The Port of Houston Authority receives revenue from terminal leases and port charges such as wharfage and dockage assessed on cargo and vessels calling on the public terminals. In addition, revenue is received by shippers/consignees from the sales of cargo shipped or received via the marine cargo terminals and from the sales of products made with raw materials received through the terminals. Since this chapter is concerned with the revenue generated from providing maritime services, the shipper/consignee revenue (i.e., the value of the cargo shipped or received through the marine terminals) will be excluded from the remaining discussion.

The revenue generated by port activity consists of many components. For example, gross revenue is used to pay employee salaries and taxes, it is distributed to stockholders of the companies providing the vessel and cargo handling services and it is used for the purchases of equipment and maintenance services. Of these components, only three can be isolated geographically with any degree of accuracy. These are the personal income component of revenue, which can be traced to geographic locations based on the residence of those receiving the income, the payment of state and local taxes and the local purchases made by firms dependent upon the maritime activity. The balance of the revenue is distributed in the form of payments to firms located outside the Houston region providing goods and services to the maritime sectors and for the distribution of company profits to shareholders.

Since it is difficult to trace all the components of the revenue beneficiaries, an estimate of revenue is developed, but no conclusions are formulated as to how the revenue (other than personal income, taxes and local purchases) is distributed, geographically. It is more accurate to trace the distribution of personal income (which is a subset of revenue) through the geographic locations of individuals receiving the income.

1. REVENUE IMPACT - TOTAL ECONOMIC ACTIVITY

In 2025, marine cargo activity at the public and private marine terminals at the Port of Houston and along the Houston Ship Channel supported a total of \$537.7 billion of total economic value in the state of Texas. Of the \$537.7 billion, \$36.1 billion is the direct business revenue received by the firms directly dependent upon the port and providing maritime services and inland transportation services to the cargo handled at the marine terminals and the vessels calling the port, as well as ship and rig repair and maintenance services. An additional \$473.6 billion represents the value of the output to the state of Texas that is created due to the cargo moving via the Port of Houston public and private marine terminals. This includes the value added at each stage of producing an export cargo, as well as the value added at each stage of production for the firms using imported raw materials and intermediate products that flow via the marine terminals and are consumed within the state. The majority of these user impacts are associated with the imported steel products receipts. In addition, \$27.9 billion of the re-spending of personal income and local consumption purchases are supported in the local and regional economy. These components are additive and represent independent monetary impacts supported by the cargo and vessel activity. Other dollar value impact measures are not included in the total economic value since they are interdependent. Direct income is not included since it is part of the direct business impact and similarly, local purchases by the firms are from the direct business revenue generated by port activity and also used to pay indirect income. Finally, taxes are paid by the individuals from the direct, induced, indirect and related income and the direct business revenue and the related output.

The balance of this section focuses only on the \$36.1 billion revenue impact generated from the provision of transportation services in support of the cargo and vessel activity at the Port of Houston. It is important to emphasize that the direct business revenue does not include the value of the cargo moving via the marine facilities.

1.1 Direct Revenue Impacts by Economic Sector

In 2025, the cargo and vessel activity at the Port of Houston's public and private marine terminals generated \$36.1 billion of business revenue to the firms providing cargo handling and vessel services and supporting the firms directly dependent upon the Port of Houston.

1.2 Direct Revenue Impacts by Economic Sector and Job Category

Exhibit III-1 presents the distribution of the \$36.1 billion of directly generated revenue across the various port sectors and job categories. This revenue includes the revenue received by firms providing services to the commodity and vessel activity at the PHA owned, leased and operated terminals and private terminals and includes revenue received by trucking firms, stevedores, the Port of Houston Authority, chandlers, vessel agents, pilots, towing companies, banking/insurance/law firms, etc.

Exhibit III-1
Revenue by Sector and Category

JOB CATEGORY	TOTAL
SURFACE TRANSPORTATION	
Rail	\$1,150
Truck	\$2,476
MARITIME SERVICES	
Terminal	\$3,851
Tug Assist	\$504
Pilots	\$429
Agents	\$44
Maritime Services	\$1,302
Forwarders	\$452
Warehouse/Container Repair	\$1,094
Marine Construction/Ship Repair	\$1,031
Linehaul Barge/Bunkering	\$363
DEPENDENT SHIPPERS/CONSIGNEES	\$22,314
BANKING/ADMIRALTY LAW	\$436
PORT OF HOUSTON AUTHORITY	\$690
TOTAL	\$36,136

Totals may not add due to rounding

The majority of the direct revenue is received by the dependent shippers/consignees, followed by the maritime services sector. Within this sector, the terminal operators generated the largest impact, \$3.9 billion, consisting of terminal operating revenue as well as revenue from pipeline operations on the terminal site.

1.3 Direct Revenue by Commodity

Exhibit III-2 shows the total revenue impact by commodity. The exhibit shows that in terms of total revenue, liquid bulk cargo including petroleum creates the largest revenue impact, followed by containers and other dry bulk cargoes.

Exhibit III-2
Revenue Impacts by Commodity

COMMODITY TYPE	TOTAL REVENUE (MILLIONS)
Containers	\$5,740
Autos/RoRo/Project Cargo	\$82
Steel	\$430
Bagged Cargoes	\$19
Forest Products	\$12
Miscellaneous Breakbulk	\$469
Bulk Grain	\$269
Other Dry Bulk	\$1,170
Petroleum (Crude and Products)	\$9,337
Other Liquid Bulk	\$15,683
Not Allocated	\$2,924
Total	\$36,136

Totals may not add due to rounding

Note: The revenue per commodity excludes the revenue estimated for banking/insurance/law, maritime services marine construction, ship repair and Port of Houston Authority, which has not been allocated to the commodity groups. This revenue is included in the not allocated category.

Exhibit III-3 shows total direct business revenue generated per ton of cargo. In terms of per ton revenue, RoRo/automobiles/project cargo generate the largest revenue per ton, as the result of the relatively high transportation cost per unit and machinery piece and the labor-intensive loading, discharge, processing and pre-staging required for export and import of RoRo and high and heavy cargo. Miscellaneous breakbulk cargo also generates relatively high direct business revenue per ton. On a per container basis, containerized cargo generates about \$2,338 per container move. This includes terminal charges, surface transportation, tugs, pilotage, forwarding and CFS operations, as well as revenue received by the dependent shippers/consignees (distribution centers). Dry bulk cargo generates a relatively high revenue per ton impact for a bulk cargo, primarily because of the large percent of dry bulk cargo moving by rail at the Port of Houston. Combining the revenue and tonnage for petroleum and petrochemicals, the liquid bulk handled at the Port of Houston generated about \$110 per 1,000 tons of liquid bulk. The relatively high revenue per ton for liquid bulk reflects the revenue generated with dependent shippers/consignees.

Exhibit III-3
Direct Business Revenue per Ton

COMMODITY TYPE	REVENUE/TON
	TOTAL
Containers	\$143
Autos/RoRo/Project Cargo	\$762
Steel	\$91
Bagged Cargoes	\$124
Forest Products	\$45
Miscellaneous Breakbulk	\$357
Bulk Grain	\$41
Other Dry Bulk	\$150
Petroleum (Crude and Products)	\$59
Other Liquid Bulk	\$219

2. PERSONAL EARNINGS IMPACT

In the previous section of this chapter, the total revenue generated by port activity was identified. As described earlier, the personal income received by those directly dependent upon port activity along the Houston Ship Channel is paid from the business revenue received by the firms supplying direct services at the marine terminals.

The income impact is estimated by multiplying the average annual earnings (excluding benefits) of each port participant, i.e., truckers, steamship agents, pilots, towing firm employees, longshoremen, warehousemen etc., by the corresponding number of direct jobs in each category. The individual annual earnings in each category multiplied by the corresponding job impact resulted in the \$8.5 billion direct personal income (wage and salary earnings) impact.

The impact of the re-spending of this direct income for local purchases is estimated using a personal earnings multiplier. The personal earnings multiplier is based on data supplied by the Bureau of Economic Analysis (BEA). The BEA estimates that for every one dollar earned by direct employees generated by activity at the marine terminals, an additional \$3.279 of personal income and consumption expenditures would be created as a result of re-spending the income for purchases of goods and services produced locally. Hence, a personal earnings multiplier of 4.279 was used to estimate the additional consumption and income impact due to re-spending – \$27.9 billion. This additional re-spending of the direct income generates the 146,427 induced jobs, described in the previous chapter.⁵

⁵It is to be emphasized that the re-spending impact of \$27.9 billion does not represent the earnings of the 146,427 induced jobs. The \$27.9 billion re-spending impact does include the direct earnings received by the employees holding the induced jobs, but the re-spending impact also includes the revenue received by the firms providing the goods/services to the direct jobs.

In addition to the direct and induced personal income and consumption impact, wages and salaries were received by the 68,069 indirect employees. Using wage and salary data for these indirect employees as reported by the U.S. Bureau of Economic Analysis, RIMS II, it is estimated that \$2.8 billion of indirect wages and salaries were created by port activity. Therefore, in 2025, the maritime activity at the Port of Houston created a total of \$39.2 billion of direct, induced and indirect wages and salaries. In addition, the related job holders received \$111.1 billion of personal wages and salaries.

3. LOCAL PURCHASES

Each of the firms surveyed were asked to provide a breakdown of local expenditures for equipment, parts, office supplies, business services, utilities, raw materials, maintenance and repair, new construction, etc. Based on the reported expenditures, it is estimated that \$8.0 billion of local purchases were made by the firms directly dependent upon maritime cargo activity at the Port of Houston's public and private marine terminals. These firms also include the refineries and petrochemical firms located along the Houston Ship Channel that ship and receive cargo by barge or vessel. These \$8.0 billion of local purchases in turn supported the 68,069 indirect jobs in the state of Texas.

4. TAX IMPACTS

State and local tax impacts are based on state and local per capita income tax burdens developed by the Tax Foundation, Tax Policy Center and the U.S. Bureau of Census State and Local Government Finances. The taxes include all state and local taxes collected in the state of Texas. Multiplying the tax per capita income burden to the total direct, induced, and indirect personal income impact plus the share of revenue earned in Texas by the corporate tax burden per dollar of revenue earned in the State, it is estimated that activity at the PHA-owned or leased marine terminals and the private terminals generated \$3.8 billion of state, county and local taxes. Of the \$3.8 billion impact, the state of Texas received \$1.9 billion, while the local governments received \$1.9 billion. In addition, the \$11.8 billion of state and local taxes were generated by the users of the Port of Houston, of which the state of Texas received \$5.8 billion and local governments received \$6.0 billion.

5. IMPACTS BY COUNTY AND LEGISLATIVE JURISDICTIONS

Total jobs, income, total economic value and state and local taxes were allocated by Texas county and then to state legislative districts as well as federal congressional districts within the state of Texas. This allocation is based on a detailed database of the origins and destinations of each cargo type moved to and from the Port of Houston public and private marine terminals by mode of transportation, as developed from S&P Transearch data. The county impacts were then allocated into legislative districts based on the share of county population in each legislative district, both for the state senate and house districts as well as the federal congressional districts in Texas. The county and legislative district impacts are presented in Appendix A to this report

IV. ECONOMIC IMPACTS OF THE PORT OF HOUSTON AUTHORITY MARINE TERMINALS



PORT HOUSTON™

In this chapter the economic impacts generated by the Port of Houston Authority owned, leased and operated marine terminals, PHA leased marine terminals and other PHA related marine terminals are detailed. These impacts are a subset of the port-wide (public and private marine terminals) discussed in the previous chapters. The impacts discussed in this chapter are the jobs, revenue, personal income and taxes generated by the Port of Houston Authority terminals, including Houston Public Grain Elevator #2, Fentress Bracewell Barbours Cut Container Terminal, Bayport Container Terminal, Bulk Materials Handling Plant, Jacintoport, Care Terminal, the PHA Terminals in the Houston Turning Basin and the Woodhouse Terminal. In previous economic impact studies, the liquid bulk tonnage handled at the Bayport Chemical Complex were included with PHA tonnage. This inclusion in previous economic impact studies reflected a relationship between the Bayport Chemical Complex and the PHA. However, since the 2011 Economic Impact Study, this relationship with the PHA no longer exists and the liquid bulk tonnage handled at the Bayport Chemical Complex is now included with the private marine terminals within the Port of Houston.

The same methodology has been used to estimate these PHA impacts as was used to estimate the total port-wide impacts of both public and private terminals, as discussed in the previous chapters. It is useful to have a separate estimate of the impacts generated by public port facilities, as these impacts can be used to demonstrate the value of public investment in port facilities. The resulting economic impact model can be used in port planning decisions, in evaluating capital projects and terminal expansions, as well as in justifying investment decisions.

In 2025, about 54.6 million tons of cargo moved over the PHA- owned or leased terminals located along the Houston Ship Channel. Exhibit IV-1 presents the tonnage by commodity and handling type. The primary commodities handled at the PHA- owned or leased terminals are containerized cargo, liquid bulk cargo, dry bulk cargo liquid bulk cargo, steel products and grain.

Exhibit IV-1
Tonnage at Port of Houston Authority Terminals

COMMODITY TYPE	1,000 Tons
Containers	40,176
Steel	4,176
Breakbulk/Project Cargo/RoRo	977
Bulk Grain	2,061
Other Dry Bulk	4,519
Liquid Bulk	<u>2,688</u>
Total	54,598

Totals may not add due to rounding.

The economic impacts generated by the cargo moving via the PHA- owned or leased terminals are summarized in Exhibit IV-2.

Exhibit IV-2
Summary of Texas Impacts Generated by PHA-Owned or Leased Marine Terminals

	PHA Terminals
JOBS	
Direct	29,361
Induced	45,307
Indirect	21,646
<i>Subtotal</i>	<i>96,314</i>
Related	<u>1,007,734</u>
Total	1,104,048
PERSONAL INCOME(MILLIONS)	
Direct	\$2,621
Re-spending/Local Personal Consumption	\$8,594
Indirect	\$875
<i>Subtotal</i>	<i>\$12,090</i>
Related	<u>\$59,810</u>
Total	\$71,901
TOTAL ECONOMIC VALUE (MILLIONS)	
Direct Business Revenue	\$8,909
Re-spending/Local Personal Consumption	\$8,594
Related Output	<u>\$246,497</u>
Total Economic Value	\$264,001
LOCAL PURCHASES (MILLIONS)	\$2,534
STATE/LOCAL TAXES (MILLIONS)	
Direct	\$272
Induced	\$816
Indirect	\$83
<i>Subtotal</i>	<i>\$1,172</i>
Related	<u>\$6,323</u>
Total	\$7,495

Totals may not add due to rounding

1. EMPLOYMENT IMPACTS

In total, 1,104,048 jobs in Texas are in some way related to the 54.6 million tons of cargo moving via the PHA marine terminals. It is to be emphasized that these 1,104,048 jobs in Texas are a subset of the 1,886,172 total jobs in Texas in some way related to cargo moving over all marine terminals at the Port of Houston.

Of the 1,104,048 total jobs in Texas associated with the PHA- owned and leased marine terminals, 29,361 direct jobs were generated by the cargo handled at PHA terminals. As the result of purchases by these 29,361 direct jobs, an additional 45,307 induced jobs were supported in the local economy. Local purchases totaling \$2.5 billion by firms dependent upon the maritime activity at the PHA terminals generated an additional 21,646 indirect jobs. An additional 1,007,734 related jobs in Texas are also supported (not generated) by the movement of containers, steel, breakbulk cargo, dry bulk and liquid bulk cargo via the public terminals.

In the remainder of this section the direct employment impact is discussed in terms of job category and commodity.

1.1 Direct Job Impacts by Job Category

Exhibit IV-3 shows that 50 percent of these 29,361 direct jobs are with maritime services sector firms. The majority of the marine service sector jobs are with warehousing/CFS operations, dockworkers/ILA, terminal and stevedoring operations, freight forwarders and jobs in maritime services. The majority of the warehousing impacts and impacts with the ILA are generated by containerized cargo.

About 21 percent of the 29,361 direct jobs are held by terminal employees, dockworkers and members of the ILA. Within the surface transportation sector, the majority of the direct jobs are held by trucking companies. About 85 percent of the 6,968 trucking jobs are generated by the movement of containerized cargo to and from the PHA terminals, as well as to and from CFS and warehouse locations. This trucking impact also includes drayage impacts between the marine terminals and railyards.

Another 22 percent of the direct PHA generated jobs are with the dependent shippers/consignees using the PHA-owned, operated and/or leased terminals, while about 3 percent of the PHA impact is with the Port of Houston Authority.⁶

⁶The Port of Houston Authority employees do not include casual ILA labor hired by the PHA for terminal work. These ILA members are included with Terminal Operator/ILA/Dockworkers category.

Exhibit IV-3
Direct Jobs by Category Generated by Cargo at PHA-Owned or Leased Marine Terminals

JOB CATEGORY	PHA
SURFACE TRANSPORTATION	
Rail	210
Truck	6,968
MARITIME SERVICES	
Terminal/ILA/Dockworkers	6,193
Tug Assist	48
Pilots	34
Agents	964
Maritime Services	567
Forwarders	1,289
Warehouse/Container Repair	4,107
Marine Construction/Ship Repair	1,260
Government	39
Linehaul Barge/Bunkering	228
DEPENDENT SHIPPERS/CONSIGNEES	6,406
BANKING/ADMIRALTY LAW	207
PORT OF HOUSTON AUTHORITY	841
TOTAL	29,361

Totals may not add due to rounding

1.2 Direct Job Impacts by Commodity Group

Exhibit IV-4 shows the direct jobs by commodity. Containerized cargo generated 20,087 direct jobs. About 30 percent of these jobs directly generated by containerized cargo are with trucking firms, about 20 percent are with the ILA and 17 percent are with warehousing, CFS and container repair operations. The handling of steel at the PHA terminals created 2,640 direct jobs, the majority concentrated with dependent shippers/consignees and terminal workers/warehousing and members of the ILA.

Exhibit IV-4
Distribution of Direct Jobs by Commodity Group – PHA Owned, Leased, Operated Marine Terminals

COMMODITY TYPE	JOBS
Containers	20,087
Steel	2,640
Breakbulk /Project Cargo/RoRo	1,142
Grain	249
Other Dry Bulk	1,075
Liquid Bulk	1,422
Not Allocated	2,746
Total	29,361

Totals may not add due to rounding.

2. REVENUE IMPACT - TOTAL ECONOMIC ACTIVITY

In 2025, marine cargo activity at the PHA owned and leased public marine terminals supported a total of \$264.0 billion of total economic value in the state of Texas. Of the \$264.0 billion, \$8.9 billion is the direct business revenue received by the firms directly dependent upon the port and providing maritime services and inland transportation services to the cargo handled at the marine terminals and the vessels calling the port, as well as ship and rig repair and maintenance services. An additional \$246.5 billion represents the value of the output to the state of Texas that is created due to the cargo moving via the Port of Houston Authority's marine terminals. This includes the value added at each stage of producing an export cargo, as well as the value added at each stage of production for the firms using imported raw materials and intermediate products that flow via the marine terminals and are consumed within the state. In addition, \$8.6 billion of personal income re-spending and local consumption are included in this total economic value supported by the Port of Houston Authority cargo activity.

The focus of this section is on the \$8.9 billion direct revenue impact generated from the provision of transportation services in support of the cargo and vessel activity at the Port of Houston Authority's marine terminals.

Exhibit IV-5 shows the revenue generated by commodities handled at the PHA-owned, operated or leased marine terminals. Containerized cargo generated the largest revenue impact, \$5.7 billion.

Exhibit IV-5
Business Revenue Generated by PHA-Owned or Leased Terminals

COMMODITY TYPE	REVENUE (MILLIONS)
Containers	\$5,740
Steel	\$378
Breakbulk /Project Cargo/RoRo	\$225
Grain	\$85
Other Dry Bulk	\$583
Liquid Bulk	\$590
Not Allocated	\$1,309
Total	\$8,909

Totals may not add due to rounding

3. PERSONAL EARNINGS IMPACT

The 29,361 direct employees received \$2.6 billion of wages and salary earnings. Based on the re-spending impact described in the previous chapter, it is estimated that an additional \$8.6 billion of local income and purchases were created, supporting the 45,307 induced jobs in the local economy. The 21,646 indirectly employed workers supported by the purchases made by the firms' dependent upon the PHA-owned or leased facilities received \$875 million of wages and salaries. In total, the cargo activity at the PHA terminals created \$12.1 billion of direct, indirect, and induced wages and salaries and local consumption expenditures in the Houston regional economy. The 1,007,734 related users received another \$59.8 billion of wages and salaries.

4. STATE AND LOCAL TAXES

The activity at the PHA- owned or leased marine terminals generated \$1.2 billion of direct, induced and indirect state and local taxes. The state of Texas received \$577.7 million in tax revenue from cargo activity at the PHA terminals and the local governments received \$594.10 million in tax revenue from PHA activity. In addition, \$6.3 billion of state and local taxes were created by the users of the Port of Houston Authority's marine terminals, the state received \$3.1 billion and the local governments received about \$3.2 billion in tax revenue.

V. COMPARISON WITH 2022 ECONOMIC IMPACTS

The same methodology has been used by Martin Associates to measure the economic impacts waterborne cargo activity at the public and private marine terminals within the Port of Houston Port District for every three to four years since 1987. The most recent study completed for the Port by Martin Associates was in 2022. Therefore, the impacts of the 2025 maritime activity can be compared to the results of the 2022 study. Overall, the changes in economic impacts are driven by changes in tonnage levels; any additions or deletions of terminal operators, tenants or dependent shippers/consignees; as well as changes in the economic impact model underlying structure that would reflect dynamic changes in the Houston, state-wide and national economies, such as recessions, inflation, growth in productivity, and changes in consumption behavior of the direct job holders.

During the 2022-2025 period, changes in tonnage levels as well as structural changes in the economy and hence the underlying economic relationships within the impact model occurred. With respect to changes in waterborne activity, total cargo handled at the public and private terminals at the Port of Houston grew by 32.8 million tons since 2022. The growth of cargo was concentrated with liquid and dry bulk cargo, most notably the growth of petroleum exports and petrochemical imports, exports and domestic waterborne shipments and receipts from 2022 levels. Dry bulk cargoes increased by about 1.5 million tons. In addition to the growth in liquid and dry bulk cargo, containerized cargo grew by nearly 5 million tons over 2022 levels. Offsetting the growth of the liquid bulk and containerized cargo, steel imports fell by nearly 2 million tons, and breakbulk cargoes fell by nearly 1.5 million tons port-wide since 2022, reflecting in part the impact of the iron and steel tariffs.

In addition to the tonnage level changes and resulting changes in direct impacts, there are several structural changes in the impact model due to changes in the Texas and national economies that occurred since the last study. The jobs to sales ratios developed from the U.S. Bureau of Census, Economic Census (conducted every five years), used in estimating induced and indirect impacts changed since the 2022 study. In the 2022 Port of Houston Economic Impact Study, the jobs to sales ratios are based on the 2017 Economic Census, due to the fact that the Economic Census data is typically released on a two-year delay and the 2022 Economic Census data was not released until 2025. This most recent Economic Census data, both at the state and national levels, reflects changes in productivity, as well as the impact of COVID that occurred since the 2017 Census data. The jobs to sales ratios used to convert the re-spending impact by the direct job holders into induced jobs fell significantly over the period, as did the jobs to sales ratios used to convert the purchases by the firms providing the direct service into indirect impacts. This contraction of jobs to sales ratios results in less induced and indirect jobs generated per dollar of consumer re-spending (which generates induced jobs) as well as purchases by the firms providing the direct services to the marine cargo and vessel activity, which generates the indirect jobs. For the induced jobs, one dollar of purchases by the direct job holders in 2025 generated 20% less induced jobs than was the case in the 2022 study. For indirect jobs, one dollar of purchases by the directly dependent firms generated 11% less jobs in 2025 than

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was the case in the 2022 study (which was based on the 2017 Economic Census data). With these structural changes identified, comparisons can be made between the 2022 and 2025 economic impact studies.

Port-wide, direct jobs increased by 14,022 new jobs since 2022. Induced jobs grew by 8,266 jobs, reflecting the growth in the direct jobs, as well as the increase in the average direct income from \$83,613 2022 to \$92,230 in 2025.⁶ This growth in average income resulted in an increase in the re-spending impact, in turn supporting increased induced jobs and local consumption impact. Indirect jobs fell by 718 jobs reflecting the lower jobs generated per dollar of purchases in the indirect job quantification that occurred since 2022. The increase in local purchases by the firms providing the direct services in 2025 was not sufficient to offset the decline in jobs generated per dollar of purchases that occurred since the 2022 study. When direct, induced and indirect jobs are considered, the port activity at the public and private marine terminals increased by 21,570 jobs due primarily to the growth in jobs associated with the growth in containerized cargo and petrochemicals and other liquid bulk cargoes. Jobs with importers and exporters using the public and private marine terminals grew by 324,185 jobs, also reflecting the growth in containerized cargo as well as petroleum exports and petrochemical imports and exports. The total economic value of the Port of Houston public and private terminals to the state of Texas grew by \$98.4 billion, reflecting the total economic value supported by containerized cargo and liquid bulk cargo moving via these terminals.

Exhibit V-I presents a comparison of the total impacts generated by both public and private terminals.

⁶The growth in average income per direct employee and the growth in number of direct jobs offset the decline in the number of induced jobs generated per dollar of consumption re-spending that occurred from the structural shifts in the jobs to sales ratios

Exhibit V-I
Comparison of Direct Economic Impacts: 2022-2025
Public and Private Marine Facilities

	Port-Wide Impacts 2025	Port-Wide Impacts 2022	Change
	92,330	78,308	14,022
	146,427	138,161	8,266
	68,069	68,787	-718
	306,826	285,257	21,570
	<u>1,579,345</u>	<u>1,255,160</u>	<u>324,185</u>
	1,886,172	1,540,417	345,755
INCOME(MILLIONS)			
	\$8,516	\$6,548	\$1,968
ing/Local Personal Consumption	\$27,923	\$20,329	\$7,595
	\$2,751	\$2,780	-\$29
	\$39,190	\$29,657	\$9,534
	<u>\$111,135</u>	<u>\$92,471</u>	<u>\$18,664</u>
	\$150,325	\$122,128	\$28,197
ECONOMIC VALUE (MILLIONS)			
Business Revenue	\$36,136	\$29,557	\$6,579
ing/Local Personal Consumption	\$27,923	\$20,329	\$7,595
Output	<u>\$473,595</u>	<u>\$389,332</u>	<u>\$84,263</u>
omic Value	\$537,654	\$439,218	\$98,437
PURCHASES (MILLIONS)	\$7,968	\$7,203	\$766
CAL TAXES (MILLIONS)			
duced, Indirect	\$3,817	\$2,580	\$1,237
	<u>\$11,789</u>	<u>\$8,045</u>	<u>\$3,744</u>
	\$15,606	\$10,625	\$4,981

Totals may not add due to rounding

COMPARISON OF PHA SUPPORTED IMPACTS WITH THE 2022 IMPACT MEASURES

Between 2022 and 2025, tonnage handled at PHA terminals fell by 463,000 tons, reflecting a 1-million-ton loss of steel products and 4-million-ton loss of bulk imports and exports. The majority of the bulk tonnage decline is driven by the loss of 3.2 million tons of liquid bulk cargo. In addition, breakbulk tonnage declined by 622,000 tons since 2022, including the loss of forest products, bagged cargo and miscellaneous breakbulk cargoes. Finally, the loss of auto and RoRo tonnage reflects the loss of the major auto account at the PHA terminals. In contrast the PHA terminals experienced a 5.2-million-ton increase in containerized cargo.

Exhibit V-2 shows the changes in economic impacts supported by the cargo handled at the PHA owned and leased marine terminals.

Exhibit E-4
Comparison of Direct Economic Impacts: 2022-2025
Port of Houston Authority Terminals Only

	PHA Terminals 2025	PHA Terminals 2022	Change
JOBS			
Direct	29,361	30,161	-799
Induced	45,307	52,705	-7,398
Indirect	21,646	26,494	-4,847
<i>Subtotal</i>	<i>96,314</i>	<i>109,360</i>	<i>-13,045</i>
Related	<u>1,007,734</u>	<u>870,135</u>	<u>137,599</u>
Total	1,104,048	979,495	124,554
PERSONAL INCOME(MILLIONS)			
Direct	\$2,621	\$2,494	\$127
Re-spending/Local Personal Consumption	\$8,594	\$7,743	\$851
Indirect	\$875	\$1,071	-\$196
<i>Subtotal</i>	<i>\$12,090</i>	<i>\$11,308</i>	<i>\$782</i>
Related	<u>\$59,810</u>	<u>\$69,990</u>	<u>-\$10,180</u>
Total	\$71,901	\$81,298	-\$9,398
TOTAL ECONOMIC VALUE (MILLIONS)			
Direct Business Revenue	\$8,909	\$9,036	-\$126
Re-spending/Local Personal Consumption	\$8,594	\$7,743	\$851
Related Output	<u>\$246,497</u>	<u>\$245,175</u>	<u>\$1,322</u>
Total Economic Value	\$264,001	\$261,953	\$2,047
LOCAL PURCHASES (MILLIONS)	\$2,534	\$2,774	-\$240
STATE/LOCAL TAXES (MILLIONS)			
Direct	\$272	\$217	\$55
Induced	\$816	\$674	\$143
Indirect	\$83	\$93	-\$10
<i>Subtotal</i>	<i>\$1,172</i>	<i>\$984</i>	<i>\$188</i>
Related	<u>\$6,323</u>	<u>\$6,089</u>	<u>\$234</u>
Total	\$7,495	\$7,073	\$422

Since 2022, the overall jobs supported by the cargo moving via the PHA owned and leased facilities grew by 124,554 total direct, induced, indirect, and related jobs. The direct jobs generated by the PHA owned and leased marine terminals fell by 799 jobs, primarily reflecting the loss of steel imports and auto imports. The growth of direct jobs generated by the increase in containerized cargo tonnage mitigated the loss in direct jobs due to the decline in steel imports, auto imports and dry bulk imports and exports. Induced jobs declined by 7,398 jobs reflecting the contraction of induced jobs generated by one dollar of re-spending and less direct jobs. Indirect jobs fell by 4,847 jobs, as the result of the reduction in local purchases, as well as the contraction of the jobs generated per dollar of purchases. As the result of the growth in containerized cargo handled at PHA facilities, an additional 137,599 user jobs were supported by the activity at the PHA terminals, reflecting the growing sphere of influence of the Port of Houston to serve importers/exporters in Texas that were previously served via out of state ports.

The overall economic value in the State that the cargo handled at the PHA facilities increased by \$2.0 billion and the state and local taxes supported by the cargo operations at the PHA facilities increased by \$422 million since 2022.

In summary, the public and private marine terminals at the Port of Houston continue to be an economic engine for the Houston area, Harris County and the state of Texas. The importance of the port's public and private marine terminals to the state is underscored by the fact that the total value of the economic impact of the public and private marine terminals is measured at \$537.7 billion in terms of total economic value to the state in 2025 and 1,886,172 jobs in the state of Texas are supported by the marine activity at the public and private terminals along the Houston Ship Channel. The continued growth the overall economic contribution of the Port of Houston public and private marine terminals demonstrates the need to continue investment in land side and Ship Channel infrastructure to accommodate the growing demand for maritime services at the Port of Houston.

Appendix – County and Legislative Economic Impacts

A-1 Total State-Wide Economic Impacts by County

TEXAS COUNTY	JOB	INCOME (MILLIONS)	ECONOMIC VALUE (MILLIONS)	STATE AND LOCAL TAXES (MILLIONS)
Harris County, TX	948,025	\$88,459.8	\$275,729.2	\$9,048.0
Dallas County, TX	108,121	\$6,153.3	\$26,255.5	\$652.8
Jefferson County, TX	68,425	\$5,753.1	\$25,239.8	\$612.2
Travis County, TX	50,270	\$2,890.7	\$12,227.3	\$306.4
Galveston County, TX	49,457	\$4,017.0	\$17,302.6	\$426.6
Tarrant County, TX	45,679	\$2,685.6	\$11,111.2	\$284.0
Bexar County, TX	41,751	\$2,456.8	\$10,141.2	\$259.8
Brazoria County, TX	41,129	\$3,377.5	\$16,047.9	\$362.6
Collin County, TX	37,662	\$2,542.8	\$11,103.2	\$270.4
Webb County, TX	37,297	\$2,066.8	\$8,993.2	\$219.7
Nueces County, TX	31,577	\$2,261.2	\$9,378.2	\$239.2
Fort Bend County, TX	24,351	\$1,563.7	\$6,248.5	\$164.8
Denton County, TX	20,725	\$1,223.6	\$5,024.5	\$129.3
Montgomery County, TX	18,923	\$1,268.3	\$4,937.4	\$133.3
Williamson County, TX	18,246	\$1,083.7	\$4,416.2	\$114.4
McLennan County, TX	16,708	\$960.8	\$4,005.1	\$101.7
San Patricio County, TX	16,087	\$1,395.8	\$6,471.0	\$149.4
Cameron County, TX	15,460	\$989.4	\$4,019.5	\$104.4
El Paso County, TX	15,339	\$864.4	\$3,705.5	\$91.8
Midland County, TX	13,583	\$919.1	\$3,552.7	\$96.5
Calhoun County, TX	12,480	\$1,089.0	\$5,273.5	\$117.2
Hidalgo County, TX	11,928	\$675.7	\$2,877.8	\$71.7
Bell County, TX	11,806	\$689.1	\$2,860.1	\$72.9
Ellis County, TX	11,567	\$756.7	\$2,838.0	\$79.3
Lubbock County, TX	10,930	\$611.7	\$2,639.8	\$65.0
Brazos County, TX	7,114	\$447.1	\$1,838.6	\$47.3
Victoria County, TX	6,496	\$510.6	\$2,351.7	\$54.6
Smith County, TX	6,203	\$364.9	\$1,542.8	\$38.7
Orange County, TX	6,095	\$408.8	\$1,730.5	\$43.3
Potter County, TX	6,062	\$337.4	\$1,462.2	\$35.9
Chambers County, TX	5,959	\$477.5	\$1,993.1	\$50.5
Gregg County, TX	5,421	\$348.5	\$1,489.6	\$37.0
Taylor County, TX	5,412	\$300.6	\$1,305.9	\$32.0
Hays County, TX	5,301	\$314.3	\$1,283.8	\$33.2
Comal County, TX	4,895	\$287.7	\$1,227.3	\$30.5
Kaufman County, TX	4,804	\$313.3	\$1,190.0	\$32.9
Johnson County, TX	4,374	\$281.5	\$1,111.6	\$29.6
Matagorda County, TX	4,319	\$357.2	\$1,638.6	\$38.2
Karnes County, TX	4,127	\$356.3	\$1,269.5	\$37.2
Rockwall County, TX	4,084	\$242.4	\$988.0	\$25.6
Ector County, TX	3,884	\$227.2	\$952.1	\$24.1
Grayson County, TX	3,714	\$218.0	\$895.7	\$23.0
Guadalupe County, TX	3,420	\$250.4	\$843.2	\$26.0
Angelina County, TX	3,300	\$210.1	\$925.8	\$22.4
Parker County, TX	3,280	\$189.1	\$793.3	\$20.0
Wichita County, TX	3,155	\$182.4	\$758.7	\$19.3
Hale County, TX	3,126	\$200.8	\$920.0	\$21.5
Hill County, TX	3,003	\$187.7	\$676.1	\$19.6
Bowie County, TX	2,871	\$162.2	\$696.0	\$17.2

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A-1 Total State-Wide Economic Impacts by County (continued)

TEXAS COUNTY	JOB	INCOME (MILLIONS)	ECONOMIC VALUE (MILLIONS)	STATE AND LOCAL TAXES (MILLIONS)
Tom Green County, TX	2,286	\$132.7	\$554.0	\$14.1
Hopkins County, TX	2,065	\$117.9	\$500.8	\$12.5
Bastrop County, TX	1,939	\$122.6	\$508.1	\$13.0
Waller County, TX	1,922	\$138.0	\$502.9	\$14.4
Hunt County, TX	1,911	\$113.9	\$456.8	\$12.0
Wise County, TX	1,904	\$119.8	\$466.3	\$12.6
Wharton County, TX	1,872	\$126.2	\$415.2	\$13.1
Anderson County, TX	1,845	\$106.9	\$451.3	\$11.3
Brown County, TX	1,781	\$102.2	\$429.9	\$10.8
Liberty County, TX	1,664	\$123.7	\$529.3	\$13.1
Burnet County, TX	1,612	\$105.7	\$494.3	\$11.3
Lee County, TX	1,544	\$117.9	\$440.0	\$12.3
Nacogdoches County, TX	1,524	\$92.6	\$382.0	\$9.8
Lamar County, TX	1,517	\$91.7	\$363.7	\$9.7
Jackson County, TX	1,498	\$104.2	\$323.8	\$10.7
Maverick County, TX	1,488	\$82.9	\$359.3	\$8.8
Reeves County, TX	1,381	\$114.0	\$416.0	\$11.9
Harrison County, TX	1,372	\$85.0	\$334.3	\$8.9
Henderson County, TX	1,331	\$77.5	\$321.7	\$8.2
Runnels County, TX	1,264	\$76.5	\$289.4	\$8.0
Hockley County, TX	1,247	\$78.4	\$345.3	\$8.3
Walker County, TX	1,213	\$76.7	\$312.0	\$8.1
Hood County, TX	1,172	\$83.7	\$431.0	\$9.1
Deaf Smith County, TX	1,163	\$87.3	\$417.6	\$9.4
Hardin County, TX	1,122	\$65.7	\$274.3	\$7.0
Falls County, TX	1,098	\$75.7	\$219.2	\$7.8
Caldwell County, TX	1,092	\$73.4	\$284.3	\$7.7
Dimmit County, TX	1,087	\$90.4	\$325.3	\$9.4
Cooke County, TX	1,072	\$66.2	\$258.9	\$7.0
Rusk County, TX	1,063	\$68.9	\$313.2	\$7.4
Wilson County, TX	1,052	\$63.8	\$252.0	\$6.7
Washington County, TX	1,010	\$64.2	\$259.9	\$6.8
Colorado County, TX	1,000	\$71.0	\$287.3	\$7.5
Milam County, TX	994	\$65.5	\$225.2	\$6.8
Navarro County, TX	988	\$61.3	\$230.7	\$6.4
Polk County, TX	971	\$58.0	\$245.3	\$6.1
Medina County, TX	965	\$57.5	\$231.0	\$6.1
Leon County, TX	950	\$68.6	\$253.5	\$7.2
Robertson County, TX	941	\$72.1	\$263.5	\$7.5
Howard County, TX	938	\$61.0	\$246.0	\$6.4
Fayette County, TX	902	\$62.7	\$252.2	\$6.6
Van Zandt County, TX	889	\$52.1	\$218.1	\$5.5
Nolan County, TX	881	\$49.0	\$213.0	\$5.2
Erath County, TX	867	\$51.7	\$210.7	\$5.5
Yoakum County, TX	854	\$70.9	\$257.6	\$7.4
Titus County, TX	853	\$53.5	\$207.3	\$5.6
Grimes County, TX	852	\$61.3	\$217.4	\$6.4
Gonzales County, TX	822	\$53.8	\$215.0	\$5.7
Shelby County, TX	784	\$44.1	\$189.4	\$4.7
Austin County, TX	780	\$56.3	\$222.2	\$5.9

A-1 Total State-Wide Economic Impacts by County (continued)

TEXAS COUNTY	JOB	INCOME (MILLIONS)	ECONOMIC VALUE (MILLIONS)	STATE AND LOCAL TAXES (MILLIONS)
Starr County, TX	778	\$43.6	\$187.1	\$4.6
Lavaca County, TX	770	\$52.9	\$201.8	\$5.5
Jim Wells County, TX	744	\$45.0	\$176.1	\$4.7
Gillespie County, TX	730	\$43.4	\$178.4	\$4.6
Winkler County, TX	705	\$53.8	\$199.4	\$5.6
Ward County, TX	693	\$52.7	\$198.3	\$5.5
Cherokee County, TX	691	\$42.0	\$170.2	\$4.4
Fannin County, TX	689	\$43.3	\$174.9	\$4.6
Jasper County, TX	682	\$41.6	\$170.4	\$4.4
Coryell County, TX	672	\$42.1	\$152.0	\$4.4
Limestone County, TX	672	\$46.6	\$203.9	\$5.0
McCulloch County, TX	648	\$47.3	\$185.4	\$5.0
Ochiltree County, TX	633	\$39.9	\$162.8	\$4.2
Morris County, TX	625	\$48.2	\$154.0	\$5.0
Andrews County, TX	608	\$42.8	\$167.7	\$4.5
Upshur County, TX	579	\$33.5	\$140.7	\$3.5
Hutchinson County, TX	567	\$35.0	\$152.2	\$3.7
Houston County, TX	562	\$38.5	\$151.2	\$4.0
Panola County, TX	561	\$34.6	\$137.9	\$3.6
Wood County, TX	559	\$33.7	\$138.4	\$3.6
Cass County, TX	540	\$32.3	\$137.6	\$3.4
Gaines County, TX	519	\$39.1	\$170.5	\$4.2
Moore County, TX	518	\$29.8	\$128.1	\$3.2
Palo Pinto County, TX	511	\$30.2	\$124.8	\$3.2
DeWitt County, TX	511	\$31.7	\$124.6	\$3.3
Uvalde County, TX	481	\$29.2	\$109.7	\$3.1
Gray County, TX	476	\$30.2	\$128.7	\$3.2
Kleberg County, TX	463	\$26.8	\$111.6	\$2.8
Bee County, TX	462	\$31.4	\$113.0	\$3.3
Burleson County, TX	455	\$29.8	\$113.9	\$3.1
Comanche County, TX	443	\$27.5	\$105.5	\$2.9
Freestone County, TX	440	\$28.6	\$116.6	\$3.0
Lampasas County, TX	433	\$24.7	\$104.7	\$2.6
Bailey County, TX	431	\$23.9	\$103.9	\$2.5
Kerr County, TX	429	\$26.6	\$104.2	\$2.8
Kendall County, TX	422	\$26.0	\$103.0	\$2.7
Atascosa County, TX	413	\$28.0	\$110.9	\$3.0
Bosque County, TX	405	\$24.5	\$97.9	\$2.6
Young County, TX	388	\$26.3	\$91.4	\$2.7
Loving County, TX	376	\$33.8	\$120.2	\$3.5
Llano County, TX	373	\$21.4	\$91.4	\$2.3
Castro County, TX	352	\$19.7	\$84.9	\$2.1
Live Oak County, TX	342	\$23.6	\$87.5	\$2.5
Eastland County, TX	336	\$19.7	\$82.4	\$2.1
Baylor County, TX	334	\$21.2	\$72.8	\$2.2
Glasscock County, TX	304	\$27.4	\$97.8	\$2.9
Refugio County, TX	304	\$20.4	\$70.8	\$2.1
San Augustine County, TX	290	\$16.1	\$70.0	\$1.7
Frio County, TX	281	\$20.7	\$68.5	\$2.1
Crane County, TX	277	\$21.6	\$81.8	\$2.3

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A-1 Total State-Wide Economic Impacts by County (continued)

TEXAS COUNTY	JOB	INCOME (MILLIONS)	ECONOMIC VALUE (MILLIONS)	STATE AND LOCAL TAXES (MILLIONS)
Scurry County, TX	262	\$16.1	\$67.1	\$1.7
Dawson County, TX	260	\$17.3	\$70.2	\$1.8
Pecos County, TX	252	\$17.1	\$66.6	\$1.8
Hamilton County, TX	251	\$16.0	\$56.7	\$1.7
Wilbarger County, TX	247	\$14.0	\$59.9	\$1.5
Coleman County, TX	246	\$15.8	\$54.7	\$1.6
Tyler County, TX	234	\$14.6	\$59.7	\$1.5
Parmer County, TX	234	\$13.0	\$56.4	\$1.4
Willacy County, TX	230	\$13.5	\$54.5	\$1.4
Zavala County, TX	230	\$15.6	\$55.7	\$1.6
Upton County, TX	219	\$14.1	\$54.7	\$1.5
Carson County, TX	213	\$13.7	\$54.3	\$1.4
Lipscomb County, TX	200	\$14.1	\$55.1	\$1.5
Clay County, TX	200	\$12.8	\$45.7	\$1.3
Mason County, TX	196	\$17.5	\$99.7	\$1.9
San Jacinto County, TX	196	\$13.0	\$51.0	\$1.4
Red River County, TX	195	\$12.2	\$45.1	\$1.3
Camp County, TX	193	\$11.2	\$47.7	\$1.2
Swisher County, TX	188	\$10.6	\$45.3	\$1.1
Blanco County, TX	185	\$11.3	\$45.5	\$1.2
Trinity County, TX	184	\$11.8	\$46.5	\$1.2
Randall County, TX	181	\$11.5	\$44.5	\$1.2
Floyd County, TX	178	\$10.0	\$43.0	\$1.1
Sabine County, TX	174	\$10.5	\$49.0	\$1.1
Hansford County, TX	172	\$10.1	\$42.6	\$1.1
Newton County, TX	169	\$10.3	\$42.9	\$1.1
Lamb County, TX	169	\$9.6	\$41.3	\$1.0
Zapata County, TX	162	\$10.2	\$39.5	\$1.1
Marion County, TX	157	\$9.3	\$39.3	\$1.0
Archer County, TX	157	\$11.6	\$34.6	\$1.2
Irion County, TX	144	\$12.9	\$45.9	\$1.3
Concho County, TX	142	\$10.0	\$28.2	\$1.0
La Salle County, TX	139	\$12.4	\$41.1	\$1.3
Madison County, TX	138	\$11.3	\$38.7	\$1.2
Montague County, TX	134	\$8.7	\$33.0	\$0.9
Duval County, TX	124	\$8.0	\$32.8	\$0.8
Rains County, TX	123	\$7.0	\$29.8	\$0.7
San Saba County, TX	118	\$7.2	\$26.9	\$0.8
Fisher County, TX	107	\$7.5	\$29.2	\$0.8
Brooks County, TX	106	\$6.6	\$27.1	\$0.7
Throckmorton County, TX	105	\$7.6	\$21.8	\$0.8
Stephens County, TX	102	\$7.5	\$25.2	\$0.8
Goliad County, TX	102	\$6.3	\$23.5	\$0.7
Delta County, TX	102	\$6.8	\$21.1	\$0.7
Val Verde County, TX	99	\$6.5	\$24.3	\$0.7
Somervell County, TX	99	\$6.6	\$28.6	\$0.7
Culberson County, TX	93	\$5.3	\$22.7	\$0.6
Garza County, TX	86	\$7.7	\$27.6	\$0.8
Jack County, TX	85	\$6.0	\$22.9	\$0.6
Crosby County, TX	81	\$4.7	\$20.4	\$0.5

THE ECONOMIC IMPACTS OF THE PORT OF HOUSTON ON THE STATE OF TEXAS, 2025

A-1 Total State-Wide Economic Impacts by County (continued)

TEXAS COUNTY	JOB	INCOME (MILLIONS)	ECONOMIC VALUE (MILLIONS)	STATE AND LOCAL TAXES (MILLIONS)
Hardeman County, TX	70	\$4.3	\$17.8	\$0.5
Callahan County, TX	64	\$4.5	\$13.2	\$0.5
Hemphill County, TX	63	\$3.8	\$15.9	\$0.4
Aransas County, TX	59	\$4.5	\$17.3	\$0.5
Terry County, TX	58	\$3.8	\$15.2	\$0.4
Sutton County, TX	55	\$4.1	\$13.4	\$0.4
Wheeler County, TX	51	\$4.3	\$15.3	\$0.4
Shackelford County, TX	49	\$3.6	\$10.3	\$0.4
McMullen County, TX	45	\$4.0	\$12.3	\$0.4
Crockett County, TX	44	\$4.0	\$14.1	\$0.4
Haskell County, TX	39	\$3.2	\$11.7	\$0.3
Borden County, TX	37	\$3.3	\$11.6	\$0.3
Martin County, TX	34	\$3.1	\$11.1	\$0.3
Menard County, TX	31	\$1.8	\$7.5	\$0.2
Mills County, TX	29	\$2.1	\$6.0	\$0.2
Cochran County, TX	29	\$2.6	\$9.2	\$0.3
Dallam County, TX	27	\$2.3	\$6.6	\$0.2
Oldham County, TX	24	\$2.2	\$7.8	\$0.2
Hartley County, TX	21	\$1.8	\$6.5	\$0.2
Mitchell County, TX	17	\$1.2	\$4.4	\$0.1
King County, TX	16	\$1.4	\$5.0	\$0.1
Knox County, TX	14	\$1.0	\$3.4	\$0.1
Jim Hogg County, TX	13	\$1.1	\$4.4	\$0.1
Schleicher County, TX	13	\$1.0	\$2.9	\$0.1
Reagan County, TX	13	\$1.1	\$3.6	\$0.1
Jones County, TX	12	\$0.9	\$3.0	\$0.1
Bandera County, TX	12	\$1.0	\$3.4	\$0.1
Kinney County, TX	10	\$0.7	\$2.3	\$0.1
Coke County, TX	9	\$0.8	\$3.0	\$0.1
Roberts County, TX	9	\$0.8	\$2.8	\$0.1
Lynn County, TX	8	\$0.7	\$3.0	\$0.1
Sterling County, TX	8	\$0.7	\$2.2	\$0.1
Motley County, TX	7	\$0.4	\$1.8	\$0.0
Kent County, TX	7	\$0.6	\$2.2	\$0.1
Sherman County, TX	6	\$0.5	\$1.6	\$0.1
Franklin County, TX	6	\$0.5	\$1.7	\$0.0
Real County, TX	5	\$0.5	\$2.3	\$0.1
Stonewall County, TX	5	\$0.4	\$1.5	\$0.0
Kenedy County, TX	5	\$0.5	\$1.6	\$0.0
Dickens County, TX	3	\$0.3	\$0.9	\$0.0
Foard County, TX	3	\$0.2	\$0.6	\$0.0
Briscoe County, TX	2	\$0.1	\$0.5	\$0.0
Childress County, TX	2	\$0.2	\$0.8	\$0.0
Cottle County, TX	2	\$0.2	\$0.5	\$0.0
Collingsworth County, TX	1	\$0.1	\$0.4	\$0.0
Armstrong County, TX	1	\$0.1	\$0.2	\$0.0
Edwards County, TX	1	\$0.0	\$0.1	\$0.0
Hudspeth County, TX	0	\$0.0	\$0.1	\$0.0
Presidio County, TX	0	\$0.0	\$0.0	\$0.0
TOTAL	1,886,172	\$150,325.3	\$537,654.3	\$15,606.2

A-2 Economic Impacts by State Senate Districts

TEXAS SENATE DISTRICTS	TOTAL ECONOMIC STATE/LOCAL			
	JOBS	INCOME (MILLIONS)	OUTPUT (MILLIONS)	TAXES (MILLIONS)
DISTRICT 1	25,571	\$1,558.1	\$6,486.0	\$164.9
DISTRICT 2	36,081	\$2,185.2	\$8,962.2	\$230.9
DISTRICT 3	73,627	\$5,745.0	\$24,991.5	\$610.8
DISTRICT 4	104,943	\$9,143.3	\$31,622.8	\$945.8
DISTRICT 5	26,093	\$1,634.7	\$6,593.2	\$172.4
DISTRICT 6	180,125	\$16,807.4	\$52,388.5	\$1,719.1
DISTRICT 7	182,206	\$16,946.9	\$52,931.7	\$1,733.8
DISTRICT 8	32,164	\$2,155.1	\$9,369.2	\$229.1
DISTRICT 9	21,012	\$1,235.4	\$5,111.1	\$130.6
DISTRICT 10	21,507	\$1,287.6	\$5,270.4	\$136.0
DISTRICT 11	143,707	\$12,487.3	\$47,440.6	\$1,304.6
DISTRICT 12	28,399	\$1,653.5	\$6,897.1	\$175.0
DISTRICT 13	157,528	\$14,528.9	\$45,616.3	\$1,487.2
DISTRICT 14	37,200	\$2,139.1	\$9,048.2	\$226.7
DISTRICT 15	189,605	\$17,692.0	\$55,145.8	\$1,809.6
DISTRICT 16	40,005	\$2,276.7	\$9,714.5	\$241.5
DISTRICT 17	115,484	\$10,238.5	\$34,751.1	\$1,056.5
DISTRICT 18	69,026	\$5,695.7	\$21,530.9	\$594.9
DISTRICT 19	17,656	\$1,054.6	\$4,289.5	\$111.3
DISTRICT 20	34,538	\$2,342.6	\$9,756.4	\$247.9
DISTRICT 21	58,820	\$3,490.3	\$14,582.3	\$369.5
DISTRICT 22	39,088	\$2,364.4	\$9,504.9	\$249.3
DISTRICT 23	37,507	\$2,138.0	\$9,108.7	\$226.8
DISTRICT 24	24,114	\$1,435.3	\$5,941.2	\$151.8
DISTRICT 25	22,362	\$1,343.6	\$5,479.8	\$141.9
DISTRICT 26	19,206	\$1,130.1	\$4,665.0	\$119.5
DISTRICT 27	42,524	\$3,103.2	\$13,474.0	\$329.8
DISTRICT 28	30,466	\$1,791.6	\$7,643.5	\$190.1
DISTRICT 29	17,066	\$1,000.9	\$4,211.1	\$106.0
DISTRICT 30	23,690	\$1,439.6	\$5,944.9	\$152.2
DISTRICT 31	34,852	\$2,280.6	\$9,181.7	\$240.5
TOTAL	1,886,172	\$150,325.3	\$537,654.3	\$15,606.2

A-3 Economic Impacts by State House Districts

TEXAS HOUSE DISTRICTS	JOB	INCOME (MILLIONS)	TOTAL ECONOMIC OUTPUT (MILLIONS)	STATE/LOCAL TAXES (MILLIONS)
DISTRICT 1	5,748	\$346.5	\$1,396.5	\$36.6
DISTRICT 2	4,865	\$283.9	\$1,175.7	\$30.0
DISTRICT 3	6,244	\$418.5	\$1,629.3	\$44.0
DISTRICT 4	5,616	\$360.6	\$1,386.3	\$37.9
DISTRICT 5	3,487	\$208.2	\$857.1	\$22.0
DISTRICT 6	5,024	\$295.6	\$1,249.7	\$31.3
DISTRICT 7	6,949	\$442.8	\$1,863.1	\$46.9
DISTRICT 8	4,044	\$240.4	\$977.7	\$25.4
DISTRICT 9	5,542	\$349.0	\$1,498.3	\$37.1
DISTRICT 10	11,567	\$756.7	\$2,838.0	\$79.3
DISTRICT 11	4,276	\$260.8	\$1,114.3	\$27.7
DISTRICT 12	5,080	\$343.7	\$1,330.5	\$36.1
DISTRICT 13	10,411	\$652.6	\$2,488.3	\$68.5
DISTRICT 14	6,189	\$389.0	\$1,599.6	\$41.1
DISTRICT 15	6,055	\$405.9	\$1,580.0	\$42.7
DISTRICT 16	5,866	\$393.2	\$1,530.6	\$41.3
DISTRICT 17	6,024	\$409.2	\$1,571.5	\$43.0
DISTRICT 18	3,739	\$253.1	\$1,052.0	\$26.8
DISTRICT 19	5,965	\$359.8	\$1,554.8	\$38.2
DISTRICT 20	6,021	\$357.6	\$1,457.4	\$37.8
DISTRICT 21	25,252	\$2,003.8	\$8,715.7	\$213.0
DISTRICT 22	50,101	\$4,209.8	\$18,460.5	\$447.9
DISTRICT 23	27,226	\$2,204.9	\$9,433.3	\$234.0
DISTRICT 24	28,190	\$2,289.7	\$9,862.5	\$243.2
DISTRICT 25	20,564	\$1,688.7	\$8,024.0	\$181.3
DISTRICT 26	5,844	\$375.3	\$1,499.6	\$39.6
DISTRICT 27	5,844	\$375.3	\$1,499.6	\$39.6
DISTRICT 28	5,844	\$375.3	\$1,499.6	\$39.6
DISTRICT 29	20,564	\$1,688.7	\$8,024.0	\$181.3
DISTRICT 30	13,696	\$1,062.9	\$4,664.0	\$113.1
DISTRICT 31	6,892	\$530.2	\$1,954.9	\$55.4
DISTRICT 32	14,585	\$1,044.7	\$4,331.3	\$110.5
DISTRICT 33	7,097	\$445.8	\$1,876.3	\$47.2
DISTRICT 34	17,052	\$1,221.1	\$5,064.2	\$129.2
DISTRICT 35	4,298	\$262.8	\$1,086.2	\$27.8
DISTRICT 36	2,505	\$141.9	\$604.3	\$15.1
DISTRICT 37	6,260	\$399.3	\$1,622.1	\$42.2
DISTRICT 38	6,802	\$435.3	\$1,768.6	\$46.0
DISTRICT 39	2,505	\$141.9	\$604.3	\$15.1
DISTRICT 40	2,505	\$141.9	\$604.3	\$15.1
DISTRICT 41	2,624	\$148.7	\$633.1	\$15.8
DISTRICT 42	25,735	\$1,426.1	\$6,205.3	\$151.6
DISTRICT 43	30,540	\$2,608.4	\$12,215.9	\$279.6
DISTRICT 44	4,242	\$304.1	\$1,058.1	\$31.6
DISTRICT 45	4,453	\$264.0	\$1,078.4	\$27.9
DISTRICT 46	8,043	\$462.5	\$1,956.4	\$49.0
DISTRICT 47	8,043	\$462.5	\$1,956.4	\$49.0
DISTRICT 48	8,043	\$462.5	\$1,956.4	\$49.0
DISTRICT 49	8,043	\$462.5	\$1,956.4	\$49.0
DISTRICT 50	8,043	\$462.5	\$1,956.4	\$49.0

A-3 Economic Impacts by State House Districts (continued)

TEXAS HOUSE DISTRICTS	JOBS	INCOME (MILLIONS)	TOTAL ECONOMIC OUTPUT (MILLIONS)	STATE/LOCAL TAXES (MILLIONS)
DISTRICT 51	8,043	\$462.5	\$1,956.4	\$49.0
DISTRICT 52	6,021	\$357.6	\$1,457.4	\$37.8
DISTRICT 53	3,519	\$235.3	\$958.5	\$24.8
DISTRICT 54	5,903	\$344.6	\$1,430.0	\$36.5
DISTRICT 55	5,903	\$344.6	\$1,430.0	\$36.5
DISTRICT 56	12,865	\$739.8	\$3,083.9	\$78.3
DISTRICT 57	4,352	\$256.9	\$1,055.1	\$27.2
DISTRICT 58	4,474	\$288.1	\$1,140.2	\$30.3
DISTRICT 59	2,962	\$193.5	\$850.5	\$20.6
DISTRICT 60	3,893	\$226.8	\$943.4	\$24.0
DISTRICT 61	7,156	\$483.1	\$2,109.6	\$51.4
DISTRICT 62	4,511	\$268.6	\$1,093.3	\$28.4
DISTRICT 63	4,559	\$269.2	\$1,105.4	\$28.4
DISTRICT 64	4,805	\$291.1	\$1,169.8	\$30.7
DISTRICT 65	4,559	\$269.2	\$1,105.4	\$28.4
DISTRICT 66	7,156	\$483.1	\$2,109.6	\$51.4
DISTRICT 67	7,156	\$483.1	\$2,109.6	\$51.4
DISTRICT 68	4,975	\$301.8	\$1,193.8	\$31.8
DISTRICT 69	4,355	\$260.6	\$1,043.3	\$27.5
DISTRICT 70	6,403	\$432.3	\$1,887.5	\$46.0
DISTRICT 71	6,369	\$355.0	\$1,535.0	\$37.7
DISTRICT 72	5,353	\$339.1	\$1,324.8	\$35.7
DISTRICT 73	5,743	\$338.0	\$1,432.7	\$35.8
DISTRICT 74	3,993	\$261.4	\$1,047.2	\$27.6
DISTRICT 75	3,528	\$198.8	\$852.3	\$21.1
DISTRICT 76	5,844	\$375.3	\$1,499.6	\$39.6
DISTRICT 77	3,681	\$207.5	\$889.3	\$22.0
DISTRICT 78	3,681	\$207.5	\$889.3	\$22.0
DISTRICT 79	3,528	\$198.8	\$852.3	\$21.1
DISTRICT 80	13,825	\$809.1	\$3,402.3	\$85.7
DISTRICT 81	5,657	\$367.5	\$1,470.1	\$38.7
DISTRICT 82	13,877	\$939.4	\$3,634.0	\$98.7
DISTRICT 83	5,106	\$292.9	\$1,251.2	\$31.1
DISTRICT 84	6,558	\$367.0	\$1,583.9	\$39.0
DISTRICT 85	7,450	\$516.9	\$1,929.8	\$54.1
DISTRICT 86	1,652	\$118.0	\$539.6	\$12.6
DISTRICT 87	8,372	\$480.5	\$2,058.9	\$51.0
DISTRICT 88	8,128	\$537.7	\$2,310.0	\$57.1
DISTRICT 89	6,779	\$457.7	\$1,998.6	\$48.7
DISTRICT 90	4,568	\$268.6	\$1,111.1	\$28.4
DISTRICT 91	4,111	\$241.7	\$1,000.0	\$25.6
DISTRICT 92	4,111	\$241.7	\$1,000.0	\$25.6
DISTRICT 93	4,111	\$241.7	\$1,000.0	\$25.6
DISTRICT 94	4,111	\$241.7	\$1,000.0	\$25.6
DISTRICT 95	4,568	\$268.6	\$1,111.1	\$28.4
DISTRICT 96	4,111	\$241.7	\$1,000.0	\$25.6
DISTRICT 97	4,111	\$241.7	\$1,000.0	\$25.6
DISTRICT 98	4,111	\$241.7	\$1,000.0	\$25.6
DISTRICT 99	4,111	\$241.7	\$1,000.0	\$25.6
DISTRICT 100	7,568	\$430.7	\$1,837.9	\$45.7

A-3 Economic Impacts by State House Districts (continued)

TEXAS HOUSE DISTRICTS	JOB	INCOME (MILLIONS)	TOTAL ECONOMIC OUTPUT (MILLIONS)	STATE/LOCAL TAXES (MILLIONS)
DISTRICT 101	4,111	\$241.7	\$1,000.0	\$25.6
DISTRICT 102	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 103	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 104	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 105	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 106	4,352	\$256.9	\$1,055.1	\$27.2
DISTRICT 107	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 108	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 109	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 110	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 111	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 112	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 113	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 114	7,568	\$430.7	\$1,837.9	\$45.7
DISTRICT 115	8,650	\$492.3	\$2,100.4	\$52.2
DISTRICT 116	4,175	\$245.7	\$1,014.1	\$26.0
DISTRICT 117	4,175	\$245.7	\$1,014.1	\$26.0
DISTRICT 118	4,175	\$245.7	\$1,014.1	\$26.0
DISTRICT 119	4,175	\$245.7	\$1,014.1	\$26.0
DISTRICT 120	4,175	\$245.7	\$1,014.1	\$26.0
DISTRICT 121	4,175	\$245.7	\$1,014.1	\$26.0
DISTRICT 122	4,175	\$245.7	\$1,014.1	\$26.0
DISTRICT 123	4,175	\$245.7	\$1,014.1	\$26.0
DISTRICT 124	4,175	\$245.7	\$1,014.1	\$26.0
DISTRICT 125	4,175	\$245.7	\$1,014.1	\$26.0
DISTRICT 126	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 127	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 128	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 129	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 130	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 131	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 132	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 133	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 134	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 135	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 136	6,021	\$357.6	\$1,457.4	\$37.8
DISTRICT 137	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 138	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 139	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 140	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 141	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 142	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 143	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 144	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 145	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 146	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 147	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 148	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 149	39,501	\$3,685.8	\$11,488.7	\$377.0
DISTRICT 150	39,501	\$3,685.8	\$11,488.7	\$377.0
TOTAL	1,886,172	\$150,325.3	\$537,654.3	\$15,606.2

A-4 Economic Impacts by Federal Congressional Districts in Texas

FEDERAL CONGRESSIONAL DISTRICTS IN TEXAS	JOB	INCOME (MILLIONS)	TOTAL ECONOMIC OUTPUT (MILLIONS)	STATE/LOCAL TAXES (MILLIONS)
DISTRICT 1	21,378	\$1,306.0	\$5,472.3	\$138.3
DISTRICT 2	95,730	\$8,658.9	\$27,531.2	\$887.6
DISTRICT 3	25,748	\$1,725.4	\$7,498.9	\$183.4
DISTRICT 4	25,033	\$1,571.5	\$6,633.2	\$166.5
DISTRICT 5	25,085	\$1,472.9	\$6,118.4	\$155.8
DISTRICT 6	29,244	\$1,806.0	\$7,094.1	\$190.0
DISTRICT 7	119,607	\$10,990.5	\$34,587.1	\$1,125.3
DISTRICT 8	85,791	\$7,735.3	\$24,645.0	\$793.1
DISTRICT 9	118,537	\$10,822.6	\$35,306.4	\$1,112.0
DISTRICT 10	25,263	\$1,617.3	\$6,512.6	\$170.6
DISTRICT 11	31,029	\$1,971.2	\$7,875.8	\$207.7
DISTRICT 12	16,751	\$981.9	\$4,071.2	\$103.9
DISTRICT 13	18,472	\$1,106.4	\$4,648.8	\$117.2
DISTRICT 14	132,566	\$10,898.9	\$46,768.4	\$1,156.3
DISTRICT 15	15,611	\$1,041.4	\$4,048.8	\$109.5
DISTRICT 16	13,652	\$769.3	\$3,297.9	\$81.7
DISTRICT 17	33,106	\$2,008.6	\$8,190.7	\$212.1
DISTRICT 18	151,684	\$14,153.6	\$44,116.7	\$1,447.7
DISTRICT 19	27,325	\$1,629.5	\$6,973.0	\$172.9
DISTRICT 20	15,865	\$933.6	\$3,853.7	\$98.7
DISTRICT 21	16,277	\$961.0	\$3,988.4	\$101.7
DISTRICT 22	54,249	\$4,393.6	\$17,067.8	\$460.3
DISTRICT 23	17,687	\$1,151.3	\$4,542.8	\$121.2
DISTRICT 24	21,775	\$1,259.9	\$5,292.2	\$133.4
DISTRICT 25	16,166	\$991.7	\$4,112.3	\$104.9
DISTRICT 26	17,891	\$1,064.1	\$4,339.7	\$112.4
DISTRICT 27	73,153	\$5,691.5	\$25,082.2	\$605.9
DISTRICT 28	46,311	\$2,631.4	\$11,204.4	\$279.1
DISTRICT 29	151,684	\$14,153.6	\$44,116.7	\$1,447.7
DISTRICT 30	30,106	\$1,715.1	\$7,311.2	\$181.9
DISTRICT 31	21,604	\$1,290.4	\$5,319.8	\$136.4
DISTRICT 32	30,496	\$1,765.3	\$7,542.1	\$187.3
DISTRICT 33	23,984	\$1,379.5	\$5,827.2	\$146.2
DISTRICT 34	20,213	\$1,259.9	\$5,165.7	\$133.1
DISTRICT 35	21,630	\$1,258.6	\$5,261.6	\$133.2
DISTRICT 36	114,312	\$10,305.7	\$34,952.5	\$1,063.4
DISTRICT 37	29,473	\$1,698.2	\$7,166.7	\$180.0
DISTRICT 38	151,684	\$14,153.6	\$44,116.7	\$1,447.7
TOTAL	1,886,172	\$150,325.3	\$537,654.3	\$15,606.2