

GCCISD CT&E Visioning Committee



Economic Development / Employment Trends : 2011 - 2012

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April 3 , 2012

Overview

- EDF Mission & Purpose
- Program of Work
- Activity Snapshot
- Trends / Notable Projects
- Q & A

Purpose Statement

The mission and purpose of the EDF is to foster economic growth.

1986

Program of Work

- Stimulate & Encourage Business
- Workforce Analysis & Development
- Facilitate Tax Incentive Programs
- Public Policy
- Conduct Educational & Informational Seminars
- Support Foreign Trade Zones
- Economic Data Clearinghouse
- Collaborate w/Public Officials & ED Allies
- Promote Regional Tourism

Activity Snapshot: 2011

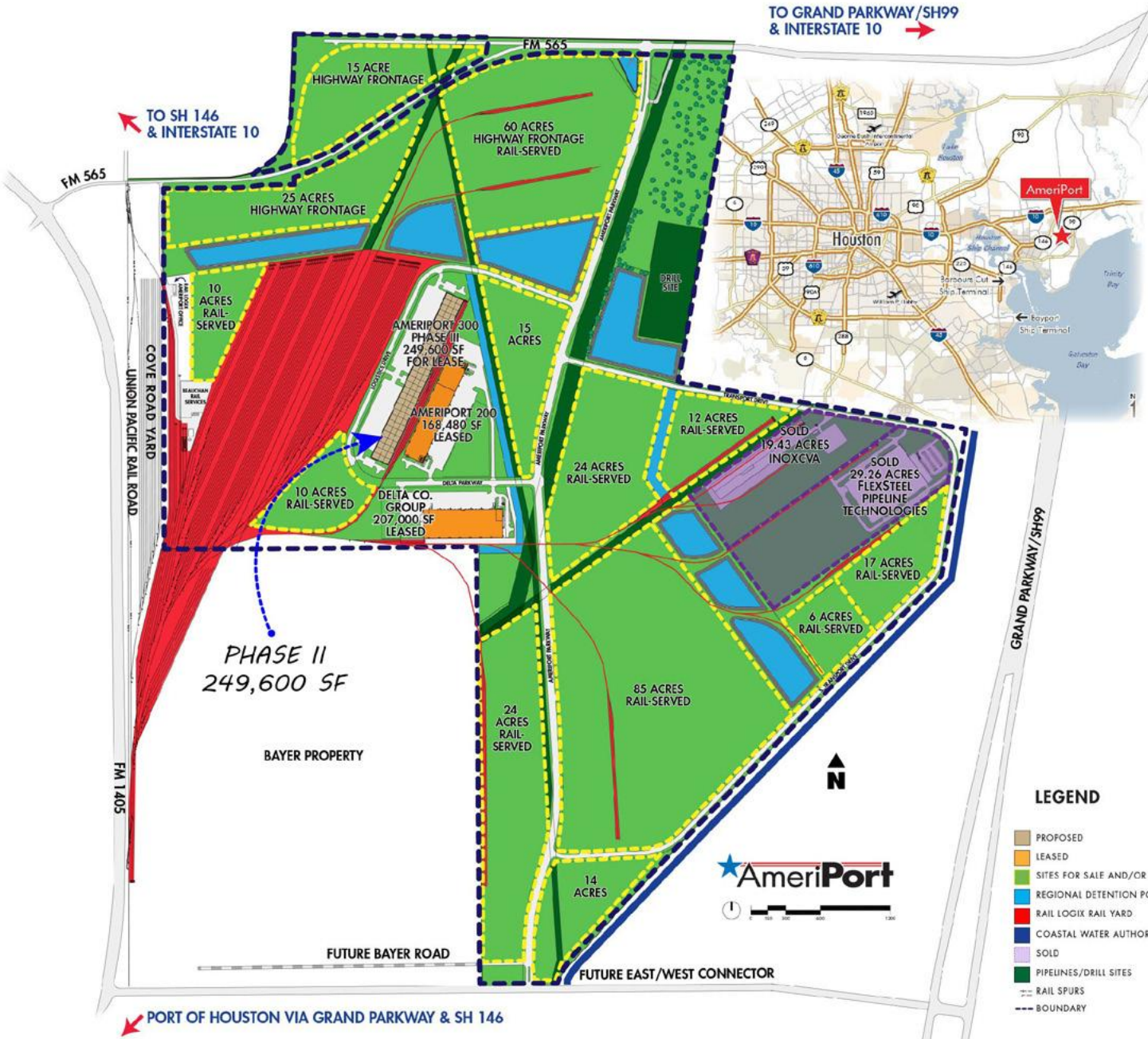
- Responded to 132 RFI generated by the Governor's Office of Economic Development & Tourism, Regional ED allies and Direct Contacts.
- Entertained 16 formal site visits in 2011:
 - Manufacturing
 - Petrochemicals / Plastics
 - Heavy Fabrication
 - Steel Pipe/ Construction Materials
 - Textiles
 - Packaging
 - Logistics & Distribution
 - Alternative Energy

Global Interests in Baytown

- Turkey
- India
- Austria
- Germany
- China
- France
- South Korea

Cedar Crossing





LEGEND

- PROPOSED
- LEASED
- SITES FOR SALE AND/OR
- REGIONAL DETENTION PC
- RAIL LOGIX RAIL YARD
- COASTAL WATER AUTHOR
- SOLD
- PIPELINES/DRILL SITES
- RAIL SPURS
- BOUNDARY





Top Employers

Methodist The Methodist
Hospital System

LEADING MEDICINE™



ExxonMobil
Taking on the world's toughest energy challenges.™



2011 Announcements / Projects

- ❑ Chevron Phillips Ethane Cracker Announcement
 - ❑ 2017 / 10,000 Construction Jobs / 300 – 400 PJ
- ❑ Bayer - \$120 MM Upgrade
- ❑ ExxonMobil – Synthetics Project
- ❑ Enterprise Products - \$301 MM / 20 Jobs
- ❑ Cedar Bayou Fractionators - \$275 MM / 12 Jobs
- ❑ ONEOK - \$275 MM / 12 Jobs
- ❑ Energy Transfer Partners - \$375 MM / 25 Jobs
- ❑ FlexSteel - \$95 MM / 130 Jobs
- ❑ Projects = ~ \$6 Billion of Capital Investment
- ❑ 11687 Construction Jobs / ~ 550 Permanent

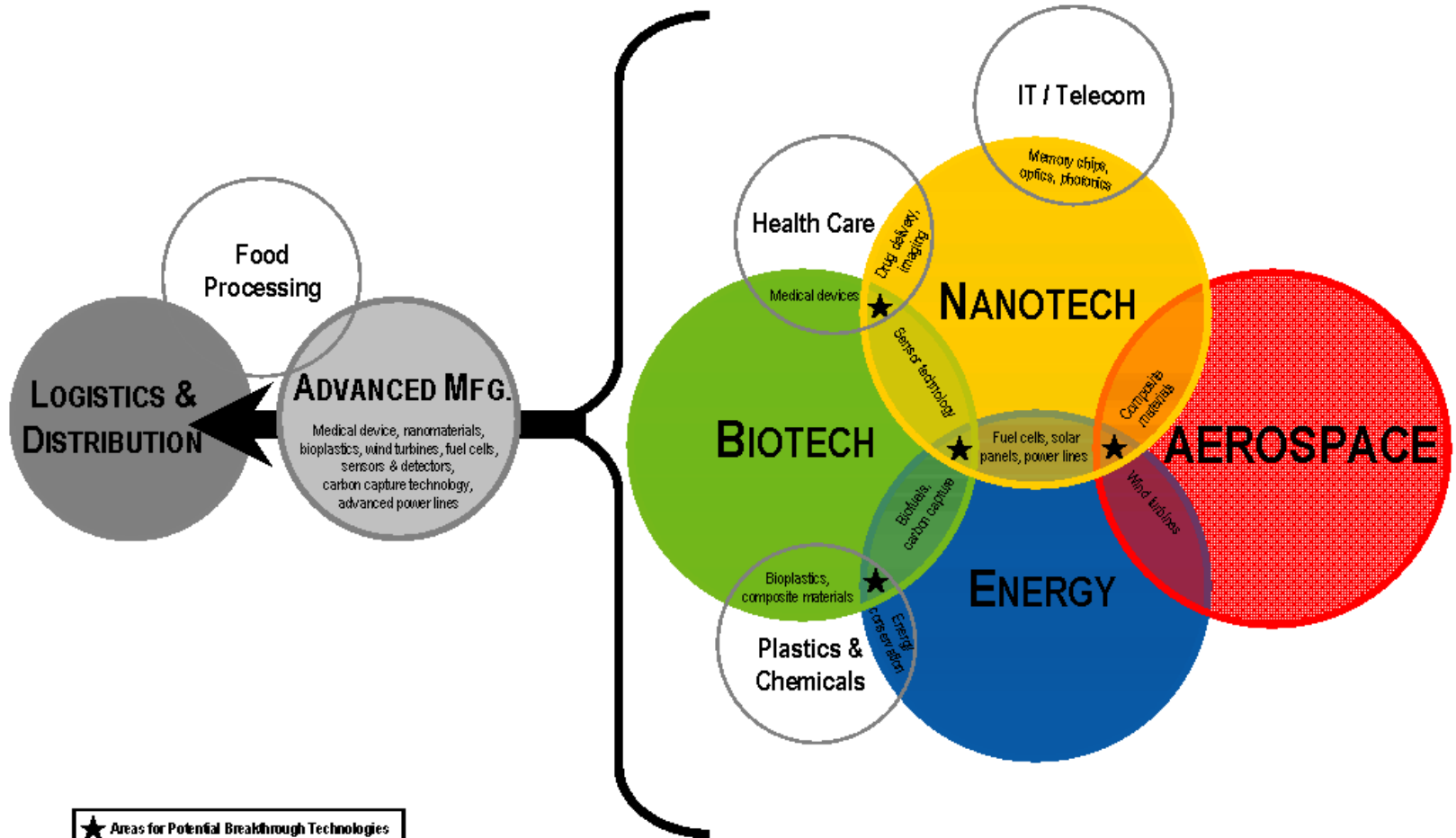
NEWS RELEASE



FOR IMMEDIATE RELEASE: March 2, 2012
HOUSTON-BAYTOWN-SUGARLAND METRO
NAMED #1 BY *SITE SELECTION*!



Industry Clusters



Houston – Baytown - Sugarland MSA Overview

- ❑ MSA Population: 5.95 MM
- ❑ CLF: 2.98 MM
- ❑ Employment: 2.72 MM

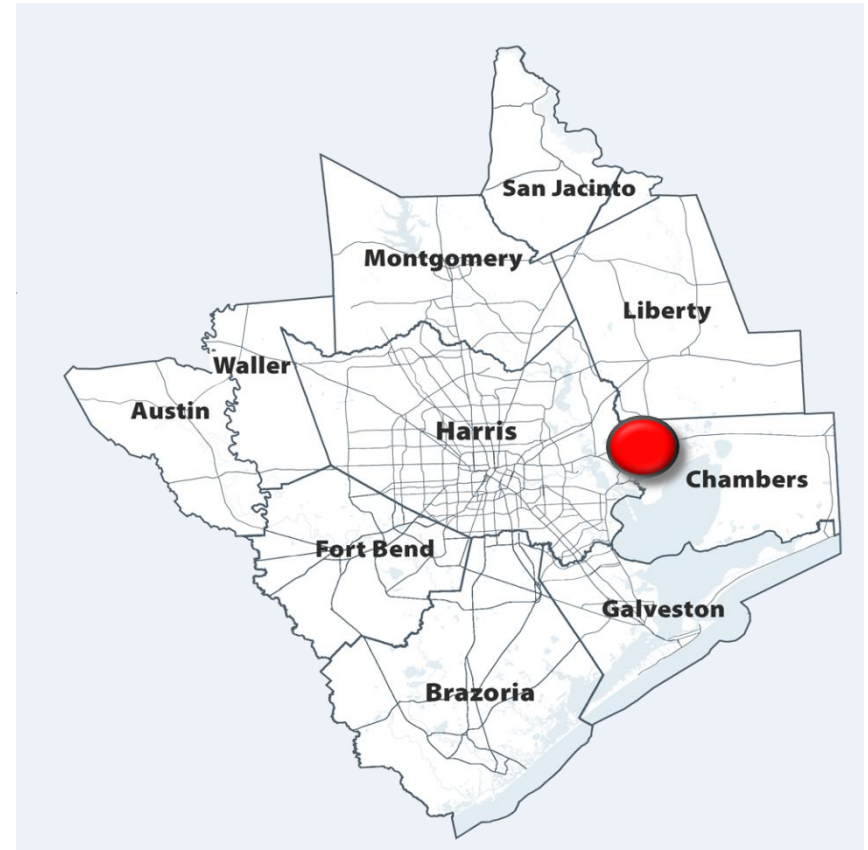
❑ City of Baytown

- ❑ Population: 72,000
- ❑ NAICS: 46,161
Industry Jobs

❑ 30 Mi Radius

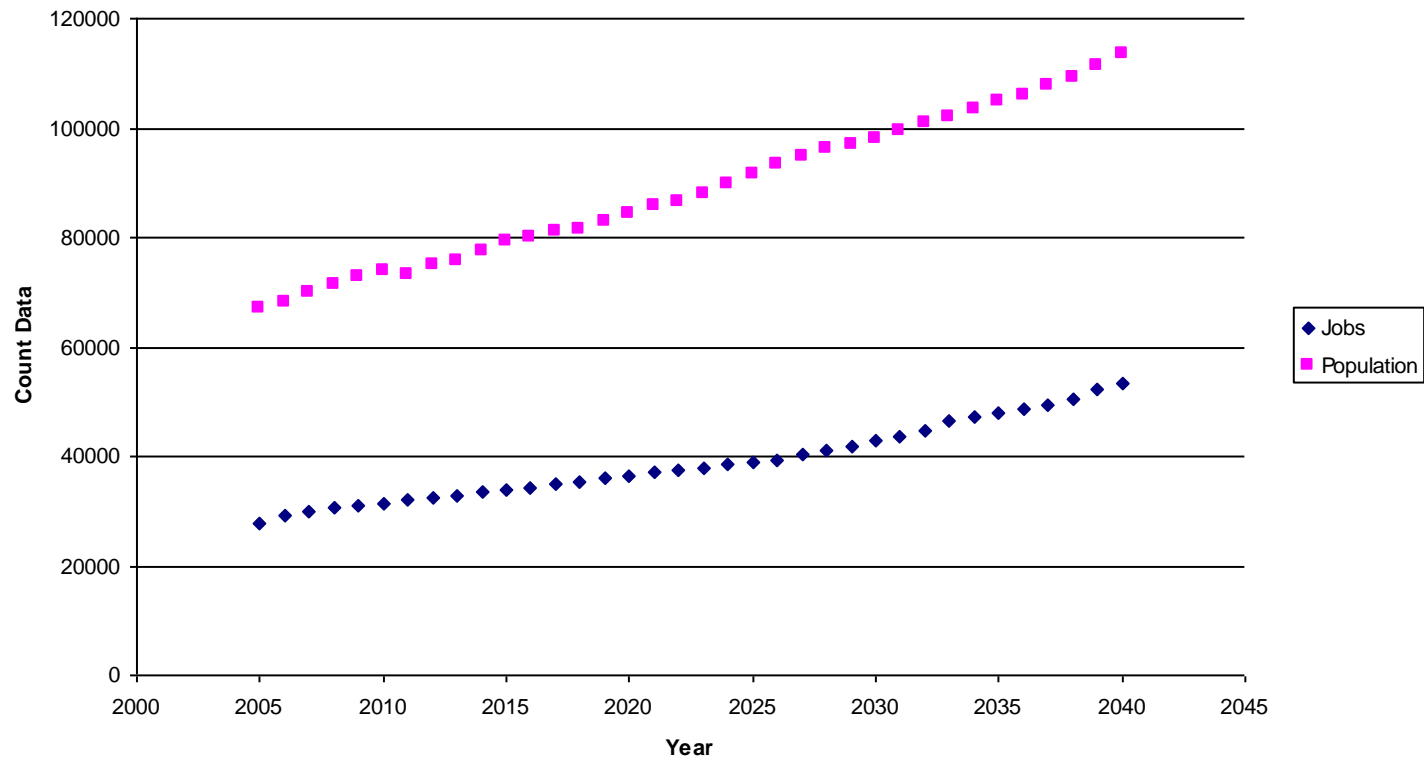
2011 E:

- ❑ Total Pop.: 2,603,664
- ❑ Age 16 + : 1,957,515
- ❑ ILF: 1,294,107
- ❑ Employed: 1,195,488
- ❑ Unemployed: 97,106



SOURCE: SitesOnTexas, BLS 01/12

Baytown Jobs and Population Projections: 2005 - 2040



Source: Houston-Galveston Area Council

Projected Job Growth - GHP

☐ 84,600 Jobs – 2012

☐ Greatest Gains:

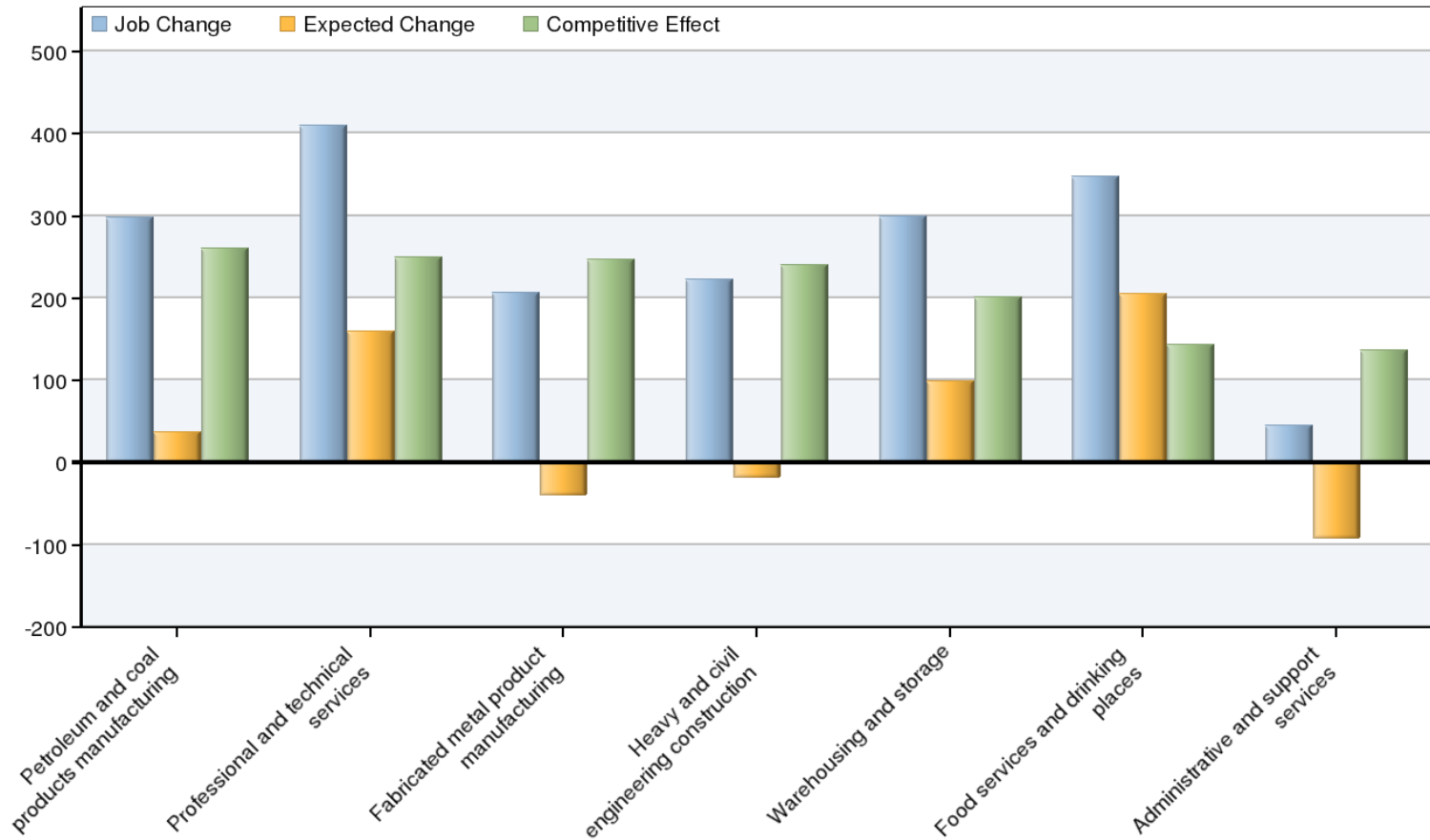
☐ Manufacturing 11,700

☐ PS & Technical 10,700

☐ Admin. Support 10,800

☐ Healthcare 10,300

Shift Share Analysis

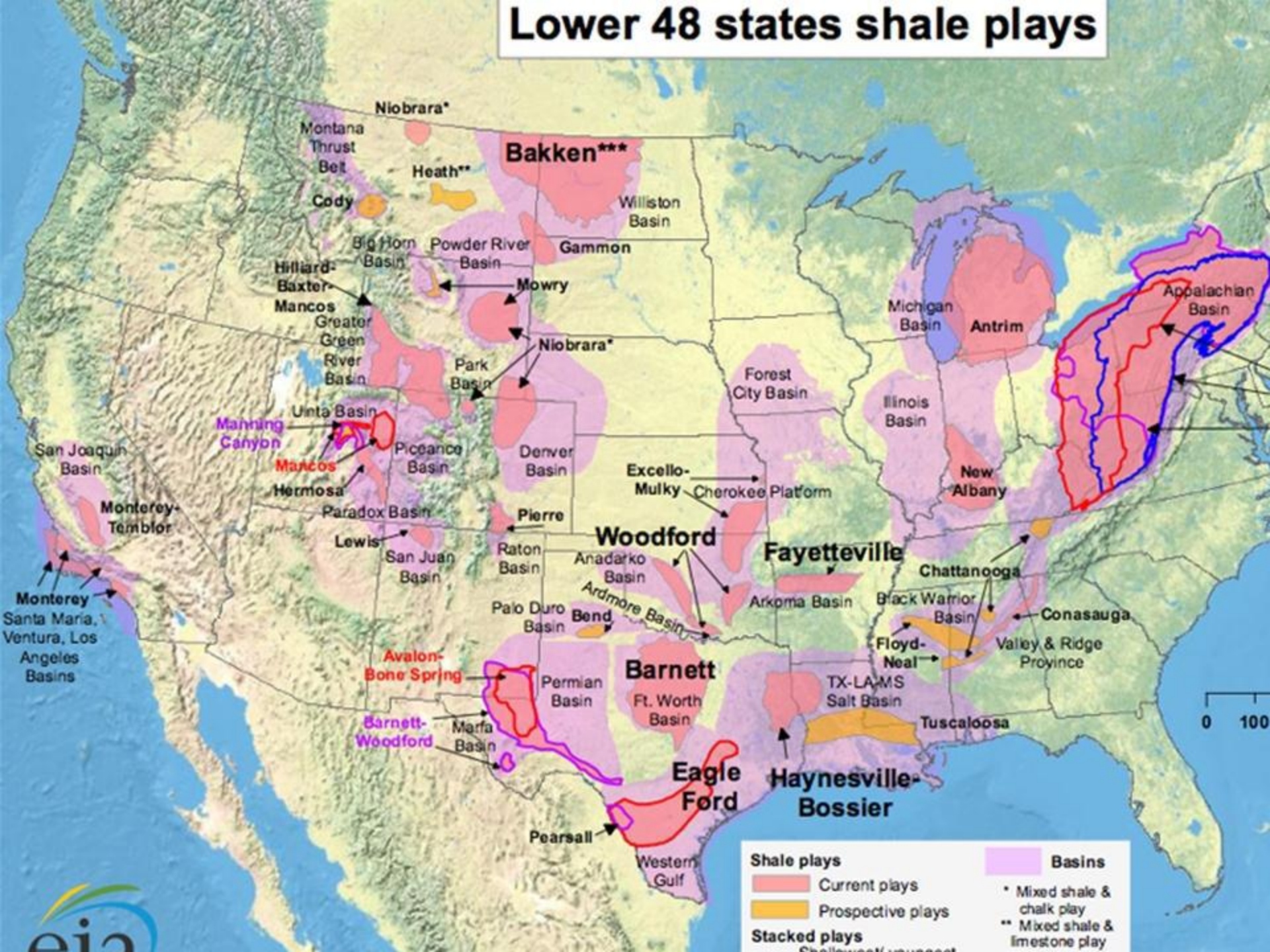


Leading Indicators (Shift-Share) Analysis of Employment Trends:
Projections of Employed Residents Living in G.C.C.I.S.D. by Economic Sector



INDUSTRY	Employment in GCCISD	Employment in GCCISD	Absolute Change in Employment	Percent Change in Employment	Projected Employment in GCCISD	Absolute Change in Employment	Percent Change in Employment
	2006	2008	2006-2008	2006-2008	2018	2008-2018	2008-2018
Agriculture, forestry, fishing, hunting, mining	653	962	309	47%	1,423	461	48%
Construction	4,686	5,750	1,064	23%	7,758	2,008	35%
Manufacturing	8,475	9,535	1,060	13%	12,039	2,504	26%
Wholesale trade	1,389	1,449	60	4%	932	-517	-36%
Retail trade	4,897	5,235	338	7%	5,907	672	13%
Transportation, warehousing, utilities	2,567	2,461	-106	-4%	3,036	575	23%
Information	713	402	-311	-44%	357	-45	-11%
Finance, insurance, real estate, rental, leasing	1,798	1,386	-412	-23%	1,513	127	9%
Professional, scientific, management, admin., waste management	4,372	3,594	-778	-18%	4,639	1,045	29%
Educational services, health care, social assistance	7,993	9,201	1,208	15%	13,605	4,404	48%
Arts, entertainment, recreation, accommodation, food services	3,106	2,528	-578	-19%	1,522	-1,006	-40%
Other services	1,807	2,473	666	37%	3,369	896	36%
Government	915	1,185	270	30%	1,018	-167	-14%
TOTAL EMPLOYMENT	43,371	46,161	2,790	6%	57,118	10,957	24%

Lower 48 states shale plays



Shale plays

- Current plays
- Prospective plays

Stacked plays

Chalco, Fort Union, etc.

Basins

- * Mixed shale & chalk play
- ** Mixed shale & limestone play

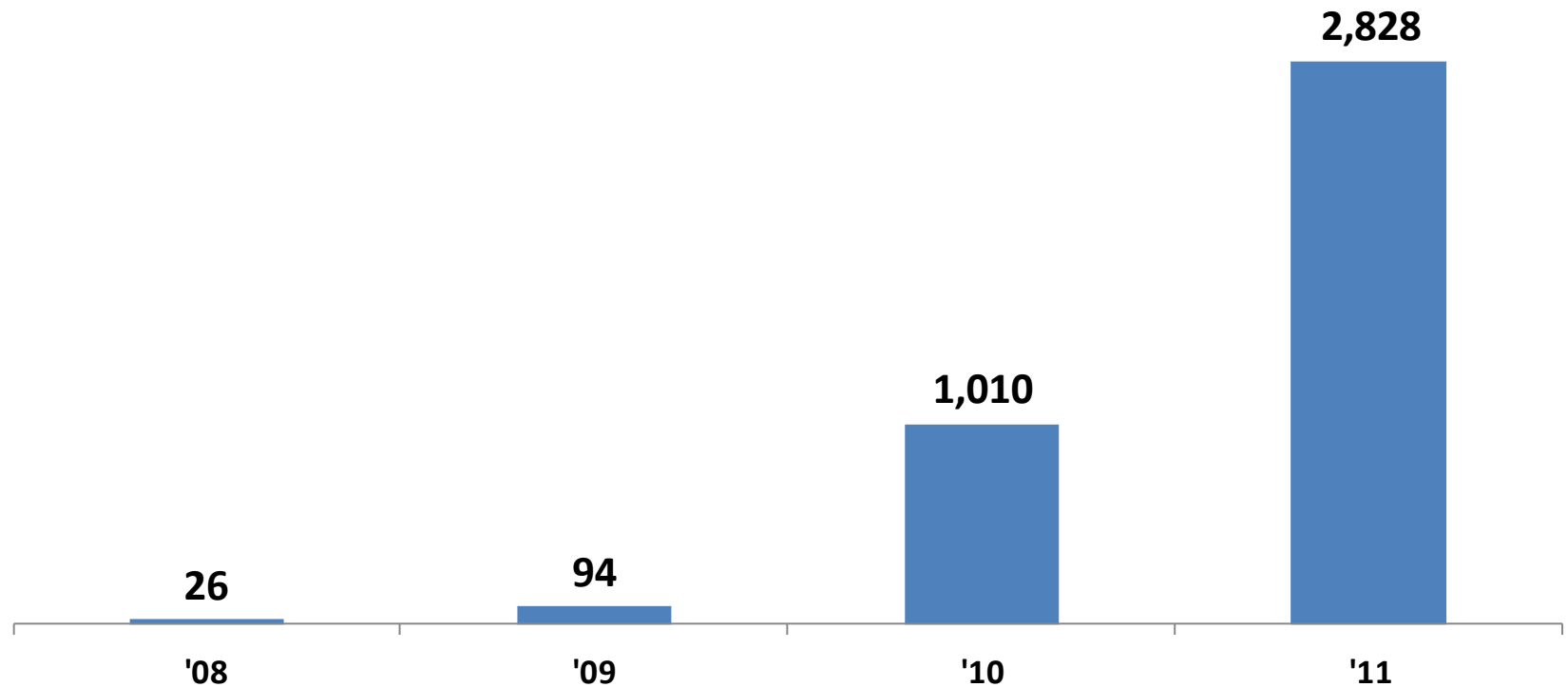


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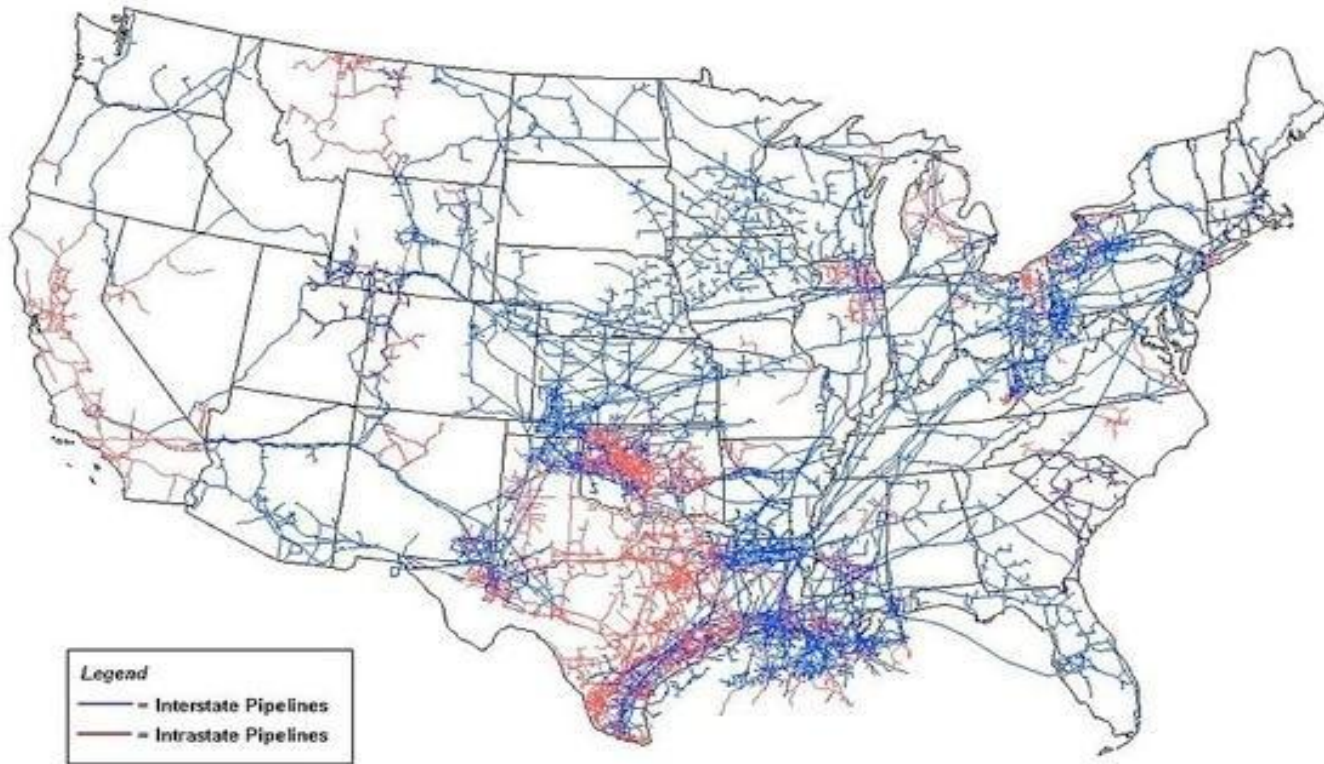
Eagle Ford Drilling Activity

Drilling Permits Issued, Texas Eagle Ford Shale



Source: Texas Railroad Commission

U.S. Natural Gas P/L System (Interstate and Intrastate Pipelines)



Source: Energy Information Administration, Office of Oil & Gas, Natural Gas Division, Gas Transportation Information System

NG Fractionation: W. Chambers





Enterprise Products Adding NGL Fractionators 7 & 8 at Mont Belvieu. Total Capacity Will Exceed 600,000 b/d at Mont Belvieu and EPD Will Have Capability to Handle 2.4 Bcf in the Eagle Ford

- Posted on [March 21, 2012](#) by [RT Dukes](#)

Fabrication / Manufacturers



Hot Jobs

NAICS 51-4121

Welders, Cutters, Solderers, Braziers

NAICS 51-4031

Cutting, Punching, & Press Machine Operators (Metal & Plastic)

NAICS 51-2041

Structural Metal Fabricators & Fitters

NAICS 23

Construction

Workforce Development

- ❑ Industry
- ❑ United Way ECE
- ❑ GCCISD CT&E
- ❑ BHISD
- ❑ Lee College



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Q & A

