Increasing Supply Chain Efficiency with SH 130
• The U.S. is Mexico’s number one trading partner.
• In May 2013 Bureau of Transportation Statistics announced that 60.8% of NAFTA Trade was moved by Truck.
• Mexico is Canada’s 4th largest trading partner and they are their 3rd largest source of imports.
• According to a recent Bloomberg Report, U.S. – Mexico truck traffic trade could reach $463 billion by 2020, a 44% rise from $322 billion in 2012.
Trade – U.S. and Mexico

Laredo:

- 6th largest customs district
  - In the top 10 of the fastest growing customs districts
- Over 3.5 million trucks crossed the Laredo border in 2012
- Trade crossing through the port of Laredo has grown year over year an average of 5.6%.
- In 2010, the FHWA Analysis Framework Database names Laredo’s top five domestic trading partners, they include:
  - Michigan - Detroit and Grand Rapids Regions
  - California – Los Angeles
  - Texas – DFW and Houston
SH 130 – Route alternative to I-35

SH 130 - a bypass of I-35 between Austin and San Antonio

• 91 mile corridor between Georgetown, TX and Seguin, TX
• “Cashless” open road tolling
  ❖ No toll booths
• No lane restrictions
• No weigh stations

Entrance/Exit Points:

• Seguin: I-10 EB/WB - Exit 614
• Georgetown: I-35 NB/SB - Exit 265

Payment Options:

• Pay by Mail
• TxTag - To obtain a TxTag please call (1-888-468-9824)
SH 130 – Route alternative to I-35

Just the facts

- Trucks pay the same rate as cars!
- I-10 and 410 are now TX 130 – easy for dispatch
- Less congestion with free flow traffic 24 hours/day.
- 24/7 roadside assistance.
- I-35 thru Austin is the 4th most congested roadway in Texas.
Who does SH 130 Benefit?

- Drivers – Hours of Service
- JIT Manufacturers
- Auto Industry
- Perishable Goods
- Time sensitive delivery
- Urban Communities
  - Environment
Opportunity Cost

• I-35 thru Austin is the #4 most congested road in Texas.
• How much do these delays actually cost?
• Cost of a reliable route?
  • Less than $18 to bypass congestion.
• Benefits of reliability.

Source: Texas Transportation Institute
Opportunity Cost

I-35 Congestion

Lane Restrictions
Truck Incentive Program

Trucks pay same toll rates as cars.

• From April 1, 2013 – March 31, 2014 trucks will be charged as a 2-axle vehicle saving you up to 67%
• Cost:
  • Pay by Mail $18 or less
  • TxTag $13 or less – To obtain a TxTag please call (1-888-468-9824)
Avoid I-35 Congestion

Bypass I-35 traffic in Austin and San Antonio. SH 130 is a 91-mile corridor that allows you to avoid congestion on Interstate 35.

Now through March 31, 2014, trucks pay the same as cars.

Questions?

✓ Fast
✓ Safe
✓ Reliable
TXDOT Freight Advisory Committee Meeting
WELCOME
San Antonio, Texas August 13, 2013
Trade Corridor Development
INTERMODALISM IS PARAMOUNT @ PSA
CG Railway, a short line railroad, operates a liner service between the U.S. and Southern Mexico consisting of two 585 foot, 115 railcar capacity, roll-on, roll-off rail ferry vessels.
Strategic Regional Partnerships

- Laredo: 2nd Largest Inland Port in the United States
- San Antonio: Region’s Largest Industrial Airport
- Corpus Christi: 5th Largest Seaport in the United States

- All are connected by excellent highways and railroads
- All have Foreign Trade Zones
OPPORTUNITIES AHEAD
Mexico: China’s unlikely challenger

By Adam Thomson

Latin America’s second-largest economy has emerged as a powerful exporter
TEXAS DEPARTMENT OF TRANSPORTATION

TEXAS FREIGHT TRANSPORTATION NEEDS AND CHALLENGES

Texas Freight Advisory Committee
San Antonio
August 22, 2013
KEY FREIGHT TRANSPORTATION NEEDS AND CHALLENGES IN TEXAS

Understanding Freight Mobility Needs and Challenges
Outline

Key Freight Transportation Needs and Issues in Texas

A. System Capacity
B. System Operations
C. Safety
D. Connectivity
E. NFTA and Border Challenges
F. Institutional-Interagency-Industry Coordination
G. Education and Public Awareness
H. Funding Challenges
Texas Freight Transportation Challenges: **System Capacity**

- Rail capacity constraints
- Lack of alternate corridors
- Congestion on key freight corridors
- Bottlenecks at interchanges on key freight corridors
- Inadequate merging lanes at many interstate interchanges
Texas Freight Transportation Challenges: **System Operations**

- Aging infrastructure
- Lack of statewide priority freight network
- Oversize/overweight/over dimensional issues
- Need for dedicated heavy weight truck corridors
- Need for truck-only lanes
- Need for comprehensive statewide incident management
Texas Freight Transportation Challenges: **Safety**

- Lack of truck parking
- Numerous at-grade rail crossings
- Presence of rail in rural areas
- Poor roadway geometrics
- Education of public on commercial vehicle needs
Texas Freight Transportation Challenges: **Connectivity**

- Need for regional corridors
- Need for connections within Texas
- Need for better port-rail connections
- Need for greater north-south connectivity to the border
- Need to connect to neighboring states’ infrastructure
- Need for more intermodal connection points
- Lack of connections between western and eastern railroads
- Need to connect US Interstate to Mexico’s infrastructure
- Lack of rural access to existing freight network
Texas Freight Transportation Challenges: NAFTA and Border Challenges

- Congestion at the Border
- Customs processing time
- Border crossing staffing issues
- Need for more technology applications
- Need for awareness of changing policies in Mexico
- Improvement of infrastructure in Mexico compared to U.S.
- Increased use of Mexico ports and impacts on Texas
- Re-shoring and impact on freight volumes and Texas infrastructure
Texas Freight Transportation Challenges: **Institutional-Interagency-Industry Coordination**

- Legislative actions
- Communication between agencies and departments
- Technology efforts - private versus public sector systems
- Collaboration to accommodate varying planning horizons
- Linking long-term efforts by agencies to market conditions
- Real-time coordination on travel conditions with neighboring states
Texas Freight Transportation Challenges: Education and Public Awareness

- Lack of public education and awareness
- Need to communicate importance of freight movement to the public
- Need for communication between public-private sectors
- Poor understanding of commercial vehicle operational needs
- Lack of understanding of role of private and public sector on infrastructure
Texas Freight Transportation Challenges: Funding Challenges

- Need to think differently
- Need to focus funding on high priority freight corridors
- Need to balance existing funding needs
- Need alternative measures for allocating funding
- Need to explore alternative funding mechanisms
- Need to promote freight transportation to elected officials
Texas Freight Transportation Challenges: **Priority Freight Network**

- Support efficient and reliable movement of freight
- Enhance safety of freight and passenger movement
- Better target investments
Discussion

- What are your thoughts on the outlined needs?
- Are there any that were missed?

www.MoveTexasFreight.com
PRELIMINARY TEXAS PRIORITY FREIGHT NETWORK

Texas Freight Advisory Committee
San Antonio
August 22, 2013
PRELIMINARY TEXAS PRIORITY FREIGHT NETWORK

Shaping the Future of Texas Economic Development and Competitiveness
What is the Texas Priority Freight Network (TPFN)?

- Cornerstone of the Texas Freight Mobility Plan
- Defines an all-mode Priority Freight Network:
  - Transportation corridors
  - Key freight generators and gateways
Why Define a Priority Freight Network?

- Serves as the backbone for prioritizing freight investments
- Facilitates efficient freight movement across Texas
- Identifies and prioritizes needs
- Assists in investment decisions
- Engages the freight and business community
- Meets US DOT and MAP-21 requirements
- Serves local, regional, statewide, national and international markets

Source: Texas Comptroller of Public Accounts.
Key Goals of the Texas Priority Freight Network

- Link Texas’ economic regions
- Meet the growing demand for freight movement
- Enhance Texas’ economic competitiveness
- Make strategic decisions for future transportation investments
Developing the Preliminary TPFN

- Trucking and rail form the “backbone” of the Texas intermodal freight transportation network
  - Trucks move 65% of freight
  - Rail moves 19% of freight
Q: What are the important criteria? Q: What else should be considered?
Texas Freight Mobility Plan

Texas Highway System

Existing Texas Highway Map

- Texas has over 313,200 lane miles of roadway
- Trucks are the dominant mode of freight movement in the State by:
  - Value = 60%
  - Weight = 58%
Texas has more than 1,000 miles of channel

Eleven deep water ports

Six commercial airports

20 intermodal rail facilities

Seventeen commercial vehicle international crossings

Two inland ports
Texas Freight Gateways/Freight Generators

- How do you define a freight gateway? (warehouse, inland port, distribution center, etc.?)

- Are there other major freight gateways or generators missing?
Are there any missing links that need to be added?

Does this provide a good start?

Where do we go from here?
Preliminary Texas Rail Priority Freight Network

Q. What are the important criteria?

- Border Crossings
- Freight Volume
- Other Railroads
- Bottlenecks
- Class I Railroads
- Others

Q. What else should be considered?
Texas Rail Network

- 2\textsuperscript{nd} largest rail network in the nation
- More than 14,361 miles of track
- 47 freight rail operators
- Any missing links that need to be added?
- What about Class II and III railroads?
- Does this provide a good start?
- Where do we go from here?
Next Steps

- Further refine the Highway and Rail TPFN
  - Input from TxFAC and other TxDOT planning partners and stakeholders
  - Analyze how commodities move along the network

- Link the TPFN to performance measures
  - Analyze network fluidity and efficiency
  - Identify opportunities for network management
  - Identifying opportunities for capital investment
Discussion

- Final thoughts on preliminary networks?
- What should be included in updated versions?
PRELIMINARY TEXAS FREIGHT TRANSPORTATION PERFORMANCE MEASURES

Texas Freight Advisory Committee
San Antonio
August 22, 2013
PRELIMINARY TEXAS FREIGHT TRANSPORTATION PERFORMANCE MEASURES

Pathway to the Future: Moving Freight Efficiently Within and Through Texas
MAP-21

- Focus on performance-based federal program
- Establishes national goal areas
- Creates performance reporting requirement
- FHWA is currently implementing
- Establishes a National Freight Policy
What are Transportation Performance Measures?

Performance measures quantify and qualify transportation system performance.

They can serve three basic functions:

1. Plan Development
2. Plan Implementation
3. Accountability
## Examples of What Some Other States are Measuring

<table>
<thead>
<tr>
<th>State</th>
<th>Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Florida</strong></td>
<td>Truck miles traveled</td>
</tr>
<tr>
<td></td>
<td>Average truck travel speed</td>
</tr>
<tr>
<td></td>
<td>Hours of truck delay</td>
</tr>
<tr>
<td><strong>Iowa</strong></td>
<td>Highway crash rates per million vehicle miles for large trucks</td>
</tr>
<tr>
<td></td>
<td>Total crashes at railroad-highway crossings</td>
</tr>
<tr>
<td></td>
<td>Percentage of rail track miles able to operate at 40mph or above</td>
</tr>
<tr>
<td><strong>Washington</strong></td>
<td>Frequency of truck speed falling below 60% of posted speed limit</td>
</tr>
<tr>
<td><strong>Minnesota</strong></td>
<td>Percent of miles below 45 mph during AM/PM peak</td>
</tr>
<tr>
<td></td>
<td>Truck daily delay</td>
</tr>
<tr>
<td></td>
<td>Cost of truck delay</td>
</tr>
<tr>
<td></td>
<td>Travel time reliability index</td>
</tr>
<tr>
<td><strong>Oregon</strong></td>
<td>Distance from center of metro area to the closest international container port</td>
</tr>
<tr>
<td></td>
<td>Number of freight facilities per 10,000 population</td>
</tr>
<tr>
<td></td>
<td>Truck travel time index</td>
</tr>
</tbody>
</table>
Lessons Learned

- Start high and get input
- Reflect broad performance concerns
- Keep it simple
- Use existing data
- Collaboration and partnership is key
What is TxDOT Doing?

- Actively participating on national performance measure task forces
- Coordinating with other transportation stakeholders throughout the State
- Assessing capacity to produce baseline and set targets for likely measures
  - Annual Hours of Delay – Interstates
  - Truck Reliability Index
Measurement Development Process

- Integrate with goals and objectives of the TFMP
- Build from existing TxDOT goals and objectives
- Include key stakeholders

Diagram:
- Stakeholders/Constituencies
- Current Goals and Objectives
- Data Analysis
- Legislative/Program Requirements
- Identify Candidate Performance Measures
- Decision-makers
- State Performance Measures
What is the Role of TxFAC?

- Provide input into performance measurement evaluation criteria
- Define how industry views performance
- Help select and prioritize goals and measures for the Freight Network
- Help identify freight significant corridors
Question #1

Q: How does your organization measure performance?
Q: How does the transportation system affect your results?

- Competitiveness
- Return on investment
- Profitability
- Reliability
- Customer satisfaction
- Productivity/efficiency
- Employee satisfaction
- Market Share
- Others
### Question #2

From your perspective, what is “good” and “bad” transportation system performance?

<table>
<thead>
<tr>
<th>“Good” Performance</th>
<th>“Bad” Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free-flowing bypass</td>
<td>Traffic and congestion</td>
</tr>
<tr>
<td>Reliable travel time</td>
<td>Crashes and accidents</td>
</tr>
<tr>
<td>Roads in good repair</td>
<td>Poor access to facilities and customers</td>
</tr>
<tr>
<td>Others</td>
<td>Others</td>
</tr>
</tbody>
</table>
# Question #3

Do these TxDOT goals capture the needs of the State’s freight system?

<table>
<thead>
<tr>
<th>General Goal Area</th>
<th>TxDOT Strategic Plan</th>
<th>Long Range Transportation Plan</th>
<th>Texas Freight Planning Technical Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety</td>
<td>Maintain a Safe System</td>
<td>Enhance safety for all Texas transportation system users</td>
<td>Safety</td>
</tr>
<tr>
<td>Preservation</td>
<td>Maintain a Safe System</td>
<td>Maintain the existing transportation system</td>
<td>Maintenance and Preservation</td>
</tr>
<tr>
<td>System Performance</td>
<td>Address Congestion</td>
<td>Promote congestion relief strategies</td>
<td>Mobility, Reliability and Congestion</td>
</tr>
<tr>
<td>Economic Development/Connectivity</td>
<td>Connect Texas Communities</td>
<td>Enhance system connectivity</td>
<td>Accessibility and Connectivity</td>
</tr>
<tr>
<td>Operations</td>
<td>Become a Best in Class State Agency</td>
<td>Develop organizational structure and strategies to address future multimodal needs</td>
<td></td>
</tr>
<tr>
<td>Environment</td>
<td></td>
<td>Develop comprehensive multimodal transportation funding strategies</td>
<td>Environmental Impact</td>
</tr>
</tbody>
</table>
Freight Performance Measures for Consideration

**Mobility**
- Annual hours of truck delay
- Truck Reliability Index
- Reduction in freight bottlenecks
- Border crossing wait times

**Safety**
- Freight related crashes and fatalities
- Rail accidents
- Eliminating/Improving at-grade rail crossings

**Preservation**
- State of good repair on Priority Freight Network

**Multi-Dimensional**
- Operational and Technology
- Intermodal access
- Others
# Question #4

Q: What specific measures should be considered in the Texas Freight Mobility Plan?

Q: Which measures do you consider most important?

<table>
<thead>
<tr>
<th>Known</th>
<th>Other Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Annual Hours of Delay – Interstates</strong></td>
<td><strong>Gross Domestic Product</strong></td>
</tr>
<tr>
<td></td>
<td>Elimination/Improvement of at-grade rail crossings</td>
</tr>
<tr>
<td><strong>Truck Reliability Index</strong></td>
<td><strong>Freight tonnage, ton-miles and value by mode</strong></td>
</tr>
<tr>
<td></td>
<td>System redundancy and ready access</td>
</tr>
<tr>
<td></td>
<td><strong>Travel time in freight corridors</strong></td>
</tr>
<tr>
<td></td>
<td>Capital investment in freight corridors</td>
</tr>
<tr>
<td></td>
<td><strong>Travel time reliability in freight corridors</strong></td>
</tr>
<tr>
<td></td>
<td>GHG emissions (e.g., CO₂)</td>
</tr>
<tr>
<td></td>
<td><strong>Freight carrier average operating costs</strong></td>
</tr>
<tr>
<td></td>
<td>Freight-related issues and complaints</td>
</tr>
<tr>
<td></td>
<td><strong>Pavement condition index</strong></td>
</tr>
<tr>
<td></td>
<td>Annual hours of truck delay</td>
</tr>
<tr>
<td></td>
<td><strong>Structurally deficient bridges</strong></td>
</tr>
<tr>
<td></td>
<td>Truck Reliability Index</td>
</tr>
<tr>
<td></td>
<td><strong>Freight related crashes and fatalities</strong></td>
</tr>
<tr>
<td></td>
<td>Reduction in freight bottlenecks</td>
</tr>
</tbody>
</table>
Performance Measurement Development Process

- Integrate with goals and objectives of TFMP
- Build from existing TxDOT work
- Selection considerations
  - Resource implications
  - Decision making value
  - Strategic alignment
  - Communication value
  - Causality
  - Requirements
Next Steps

1. Get input on preliminary measures
2. Adjust measures as goals and objectives are identified
3. Research data availability
4. Research legislative requirements
Discussion

www.MoveTexasFreight.com
A Driving Force: Texas-Mexico Automotive SuperCluster (TMASC)

David Marquez, Executive Director
Bexar County Economic Development
August 21, 2013
Bexar County Economic Development drives new investment and job creation in the greater County region.
Texas-Mexico Automotive SuperCluster (TMASC): Regional strategy aimed at developing the vehicle manufacturing industry for job creation and capital investment.

Coahuila ● Nuevo Leon ● San Luis Potosi ● Tamaulipas ● Texas
Changing Geography of Automotive Assembly
The TMASC Region

Year of Production Start
- 1919 - 1949
- 1950 - 1989
- 1990 - 2010
- 400-mile radius of I-35 Corridor*

Cluster Effect: Toyota Motor Manufacturing, Texas, Inc.
$2.1B direct investment; 2,900 direct jobs
21 on-site suppliers; 2,800 jobs
The TMASC Region
Figures from 2008 TMASC Market Study

<table>
<thead>
<tr>
<th>Type</th>
<th>Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automotive assembly and parts plants</td>
<td>6</td>
</tr>
<tr>
<td>Commercial and military vehicle manufacturing plants</td>
<td>7</td>
</tr>
<tr>
<td>Heavy equipment manufacturers</td>
<td>4</td>
</tr>
<tr>
<td>Specialty vehicle manufacturers</td>
<td>3</td>
</tr>
<tr>
<td><strong>TOTAL PLANTS</strong></td>
<td><strong>20</strong></td>
</tr>
</tbody>
</table>

The TMASC Region
Change from 2008 to 2012

<table>
<thead>
<tr>
<th>TYPE</th>
<th>QTY</th>
<th>NET CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automotive assembly and parts plants</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Commercial and military vehicle manufacturing plants</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>Heavy equipment manufacturers</td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>Specialty vehicle manufacturers</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td><strong>TOTAL PLANTS</strong></td>
<td><strong>28</strong></td>
<td><strong>7</strong></td>
</tr>
</tbody>
</table>

NEW INVESTMENT: ~ $2.7 B

Continued Assembly Investment
Caterpillar expands in six TMASC areas

- Jun 2010 - New $170M diesel engine plant in Seguin, TX; 1,400 jobs created.
- Mar 2011 - New 75,000 sq. ft., $30M tools manufacturing facility in Waco, TX; 62 jobs created.
- Apr 2011 - New 260,000 sq. ft., $33M engine head manufacturing plant in Schertz, TX; 150 jobs created.
- Jun 2011 - New 1 million sq. ft., $200M facility in Victoria, TX to manufacture hydraulic excavators; 600 jobs created.
- Nov 2011 - Expansion of heavy mining truck plant in Ciudad Acuña, COA; 430 jobs created.
- Nov 2012 - New $500M gear and parts plant in Cienega de Flores, NL; 1,000 jobs created.

Sources: Greater Waco Chamber, Caterpillar Press Release, June 17, 2011; herald-zeitung.com, April 1, 2011, Maquila Portal
### Key Advantage:

Younger Population Relative to Other North American Sites

#### MEDIAN AGE 2010

<table>
<thead>
<tr>
<th>Country</th>
<th>Median Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>44.7</td>
</tr>
<tr>
<td>Canada</td>
<td>39.9</td>
</tr>
<tr>
<td>NJ</td>
<td>39.0</td>
</tr>
<tr>
<td>OH</td>
<td>38.8</td>
</tr>
<tr>
<td>MI</td>
<td>38.9</td>
</tr>
<tr>
<td>KY</td>
<td>38.1</td>
</tr>
<tr>
<td>TN</td>
<td>38.0</td>
</tr>
<tr>
<td>SC</td>
<td>37.9</td>
</tr>
<tr>
<td>MO</td>
<td>37.9</td>
</tr>
<tr>
<td>AL</td>
<td>37.9</td>
</tr>
<tr>
<td>VA</td>
<td>37.5</td>
</tr>
<tr>
<td>NC</td>
<td>37.4</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>37.2</td>
</tr>
<tr>
<td>IN</td>
<td>37.0</td>
</tr>
<tr>
<td>IL</td>
<td>36.6</td>
</tr>
<tr>
<td>OK</td>
<td>36.2</td>
</tr>
<tr>
<td>MS</td>
<td>36.0</td>
</tr>
<tr>
<td>GA</td>
<td>35.3</td>
</tr>
<tr>
<td>CA</td>
<td>35.2</td>
</tr>
<tr>
<td>China</td>
<td>34.5</td>
</tr>
<tr>
<td><strong>TX</strong></td>
<td><strong>33.6</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Median Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>29.1</td>
</tr>
<tr>
<td>Mexico</td>
<td>26.6</td>
</tr>
<tr>
<td>India</td>
<td>25.1</td>
</tr>
</tbody>
</table>

#### MEDIAN AGE 2030

<table>
<thead>
<tr>
<th>Country</th>
<th>Median Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>51.4</td>
</tr>
<tr>
<td>Canada</td>
<td>43.7</td>
</tr>
<tr>
<td>China</td>
<td>42.5</td>
</tr>
<tr>
<td>SC</td>
<td>41.3</td>
</tr>
<tr>
<td>MS</td>
<td>41.1</td>
</tr>
<tr>
<td>AL</td>
<td>41.0</td>
</tr>
<tr>
<td>NJ</td>
<td>40.8</td>
</tr>
<tr>
<td>OH</td>
<td>40.2</td>
</tr>
<tr>
<td>MI</td>
<td>40.2</td>
</tr>
<tr>
<td>KY</td>
<td>40.0</td>
</tr>
<tr>
<td>MO</td>
<td>39.6</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>38.7</td>
</tr>
<tr>
<td>TN</td>
<td>38.3</td>
</tr>
<tr>
<td>OK</td>
<td>37.9</td>
</tr>
<tr>
<td>VA</td>
<td>37.8</td>
</tr>
<tr>
<td>IL</td>
<td>37.8</td>
</tr>
<tr>
<td>IN</td>
<td>37.7</td>
</tr>
<tr>
<td>Brazil</td>
<td>37.4</td>
</tr>
<tr>
<td>CA</td>
<td>37.4</td>
</tr>
<tr>
<td>NC</td>
<td>36.8</td>
</tr>
<tr>
<td>Mexico</td>
<td>36.2</td>
</tr>
<tr>
<td>GA</td>
<td>35.6</td>
</tr>
<tr>
<td><strong>TX</strong></td>
<td><strong>34.6</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Median Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>31.2</td>
</tr>
</tbody>
</table>

Source: UN Secretariat, U.S. Census, CIA World Factbook
Key Advantage: Younger population fuels growth

- Larger consumer markets
- Sources for manufacturing and corporate talent

Source: July 2013 U.S. Metro Economies report by U.S. Conference of Mayors
Toyotas North American operations are constantly working to identify and expand new export opportunities for the vehicles we produce here, building on our
Oil & Gas Exploration
Strengthens economic resiliency & drives growth

Shale regions producing:
- Oil
- Wet gas, condensate
- Dry gas
### Mexico Automotive Investments (2011-2012)

<table>
<thead>
<tr>
<th>Operation</th>
<th>Location</th>
<th>Investment</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audi New Plant</td>
<td>Puebla, PU, MEX</td>
<td>$1.3 B</td>
<td>N/A</td>
</tr>
<tr>
<td>Ford Plant Expansion</td>
<td>Hermosillo, SO, MEX</td>
<td>$1.3 B</td>
<td>1,000</td>
</tr>
<tr>
<td>GM Expansions</td>
<td>San Luis Potosi, SL, MEX &amp; Silao, GJ, MEX</td>
<td>$420 M</td>
<td>1,000</td>
</tr>
<tr>
<td>Honda New Plant</td>
<td>Guanajuato, GJ, MEX</td>
<td>$800 M</td>
<td>3,200</td>
</tr>
<tr>
<td>Nissan New Plant</td>
<td>Aguascalientes, AG, MEX</td>
<td>$2 B</td>
<td>3,000</td>
</tr>
</tbody>
</table>

Audi Chairman Rupert Stadler introduces one of the maker's new models.
## Texas Automotive Investments (2011-2012)

<table>
<thead>
<tr>
<th>Operation</th>
<th>Location</th>
<th>Investment</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>BMW Distribution Center</td>
<td>Lancaster, TX, USA</td>
<td>N/A</td>
<td>65</td>
</tr>
<tr>
<td>Continental Plant Expansion</td>
<td>Seguin, TX, USA</td>
<td>$113 M</td>
<td>300</td>
</tr>
<tr>
<td>GM Plant Expansion</td>
<td>Arlington, TX, USA</td>
<td>$200 M</td>
<td>180</td>
</tr>
<tr>
<td>GM Tech Center</td>
<td>Austin, TX, USA</td>
<td>N/A</td>
<td>500</td>
</tr>
<tr>
<td>Caterpillar New Plant</td>
<td>Victoria, TX, USA</td>
<td>$200 M</td>
<td>225</td>
</tr>
<tr>
<td>Formula 1 New Track</td>
<td>Austin, TX, USA</td>
<td>$400 M</td>
<td>300</td>
</tr>
</tbody>
</table>
TMASC Goals:
1. Two new assembly plants by 2015.

Key: regional alignment, collaborative recruitment
Future Opportunities

- Kit assembly plants for commercial trucks and heavy equipment
- Aerodynamic, mechatronics, power system, & telematics innovation
- Corporate functions for Western Hemisphere
Learn more at
www.txmxautomotive.com
www.twitter.com/bexarbiz
www.twitter.com/TMASC

Thank you.

David Marquez
Executive Director
Bexar County Economic Development

T: (210) 335-0667
dmarquez@bexar.org
www.bexar.org
www.txmxautomotive.com