The Challenges and Opportunities for the Port of Houston

CAPT Bill Diehl, USCG (Ret.)
Annual Vessel Arrivals
Port of Houston

2011
8,022 Ships

- Tanker: 45%
- Chemical Tanker: 13%
- Bulk: 8%
- General Cargo: 11%
- Container: 11%
- Pure Car Carrier: 1%
- LPG: 5%
- Pilot Moved Tug and Barge: 5%

2014
8,338 Ships

- Tanker: 34%
- Chemical Tanker: 16%
- Bulk: 12%
- General Cargo: 12%
- Container: 12%
- LPG: 7%
- Pure Car Carrier: 1%
- Pilot Moved Tug and Barge: 5%

2011-2015 Port of Houston Vessel Arrivals

*Source Greater Houston Port Bureau July 2015*
Adding to World Supply

Annual Change in Oil Production
OPEC, NON-OPEC (x U.S.), and the U.S. (MBD)

*Source EIA
Price is the Arbiter

World Oil Supply and Consumption

Price of West Texas Intermediate Crude Oil

(Annual Data)

*Source EIA

Greater Houston Port Bureau
Houston Crude Oil Imports by Quality
In thousands of barrels

*Source EIA 2015
Estimated Petroleum Exports for the Port of Houston (MBD)

*Source Greater Houston Port Bureau, EIA*
$100+ Billion of Planned U.S. Petrochemical Investments*

*Notes: Date reflects anticipated year in-service, red font reflects construction in progress, unk=unknown.
US Producers to Target Key Markets
Dredging Challenges

- Harbor Maintenance Trust Fund
- PHA Study – Wider vs. Deeper Dredging
- Accommodating Post-Panamax Ships
Waterside Congestion

- Inefficient scheduling
- Increase in non-productive movements
- Increase in waterway congestion
Shoreside Congestion

- Insufficient Supply chain growth
  - Transportation
  - Work Force
  - Storage
Questions/Comments?