

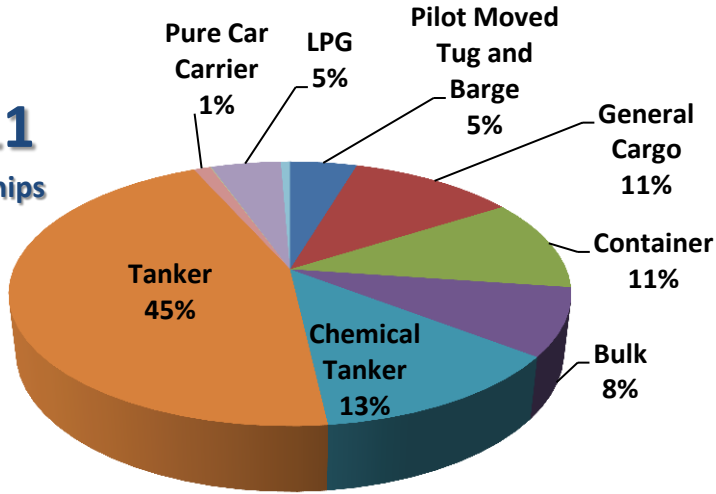
The Challenges and Opportunities for the Port of Houston

**CAPT Bill Diehl,
USCG (Ret.)**

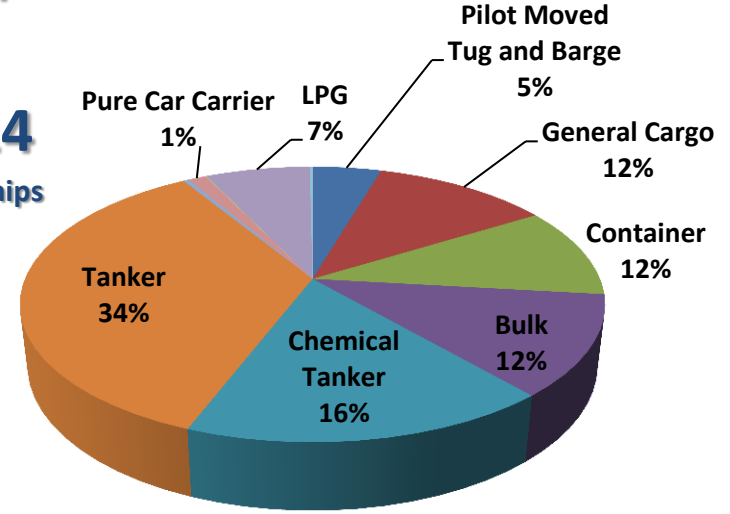


Annual Vessel Arrivals Port of Houston

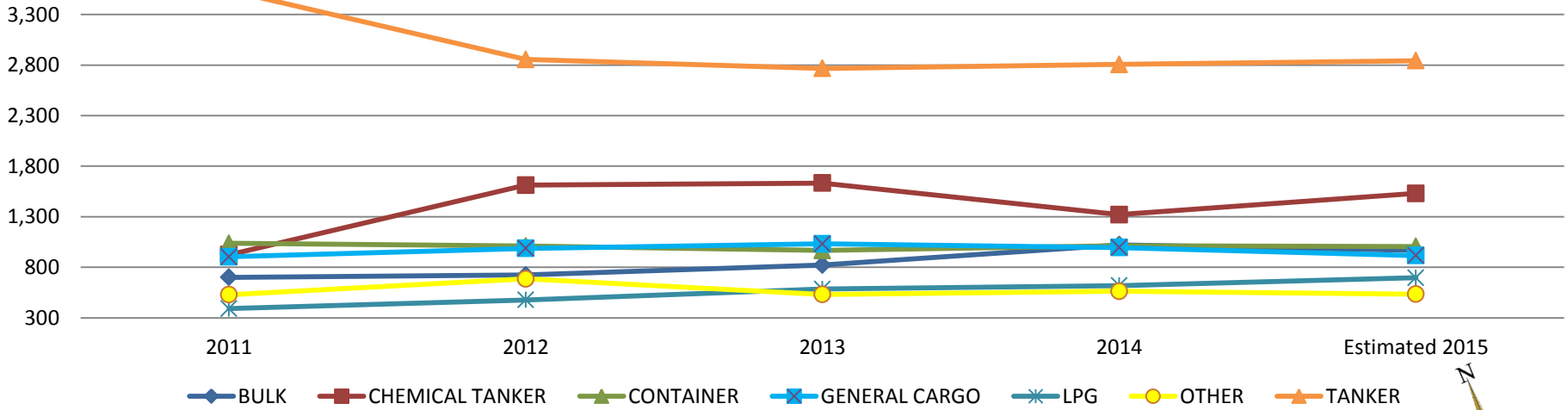
2011
8,022 Ships



2014
8,338 Ships



2011-2015 Port of Houston Vessel Arrivals

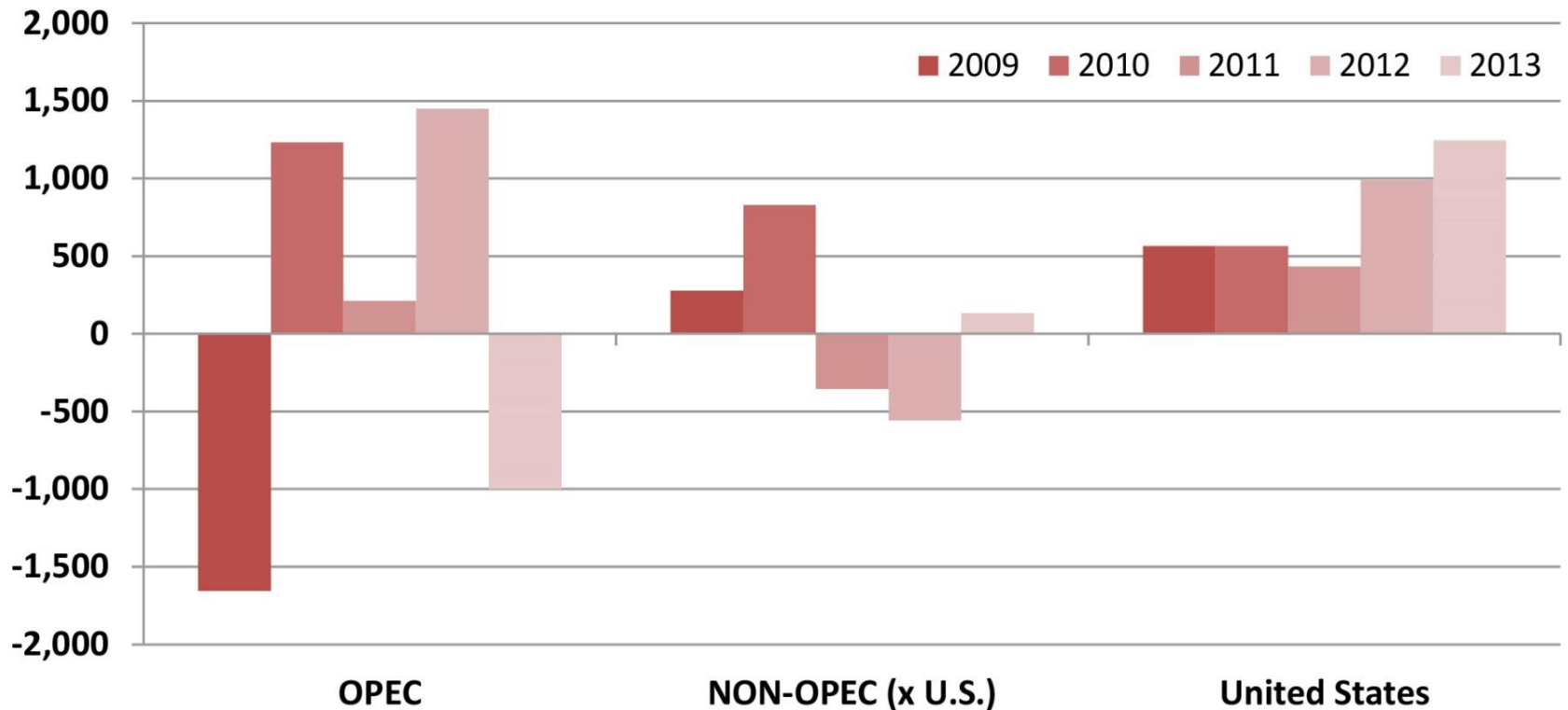


*Source Greater Houston Port Bureau July 2015



Adding to World Supply

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



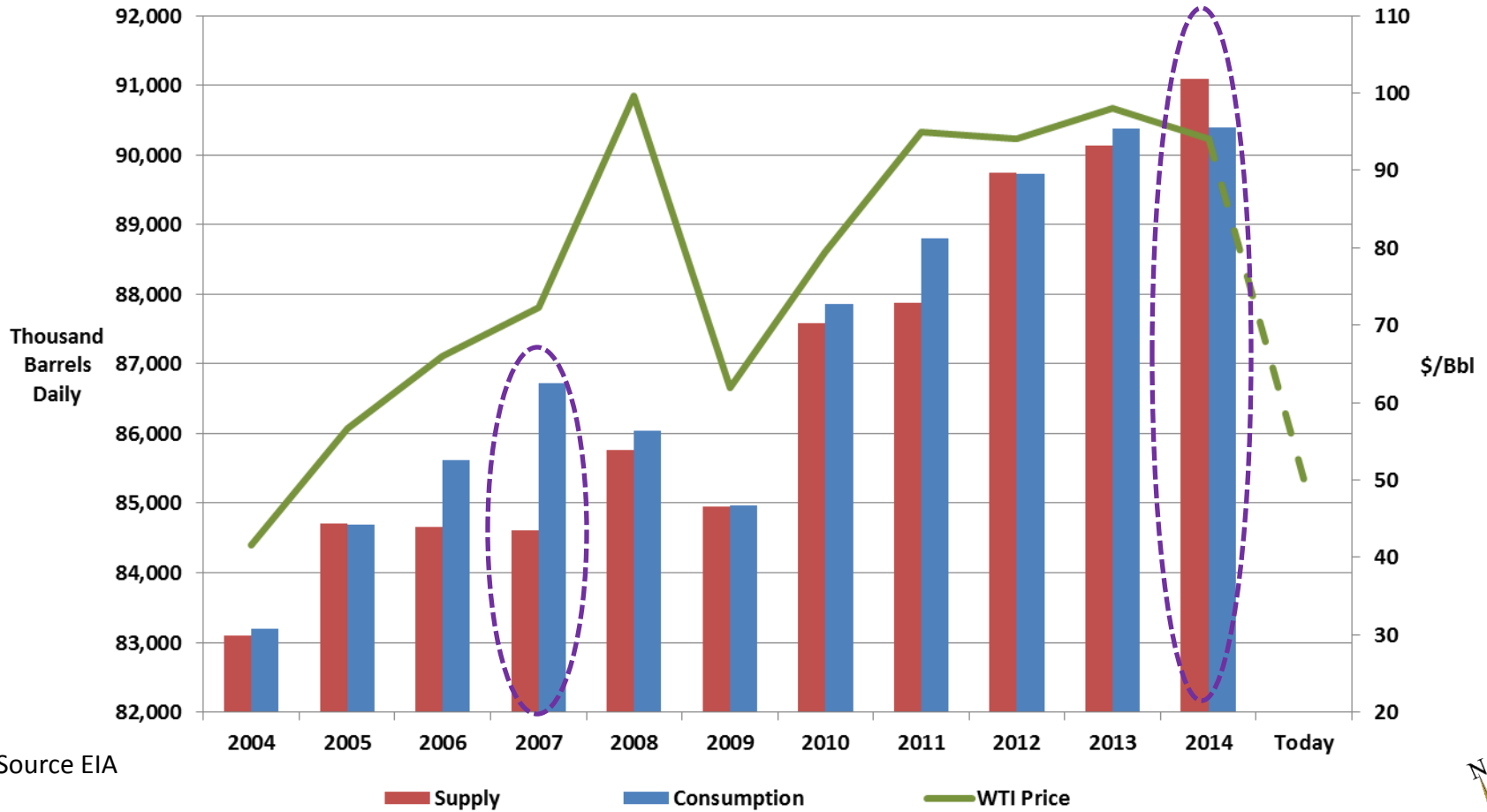
*Source EIA



Price is the Arbiter

World Oil Supply and Consumption

Price of West Texas Intermediate Crude Oil (Annual Data)

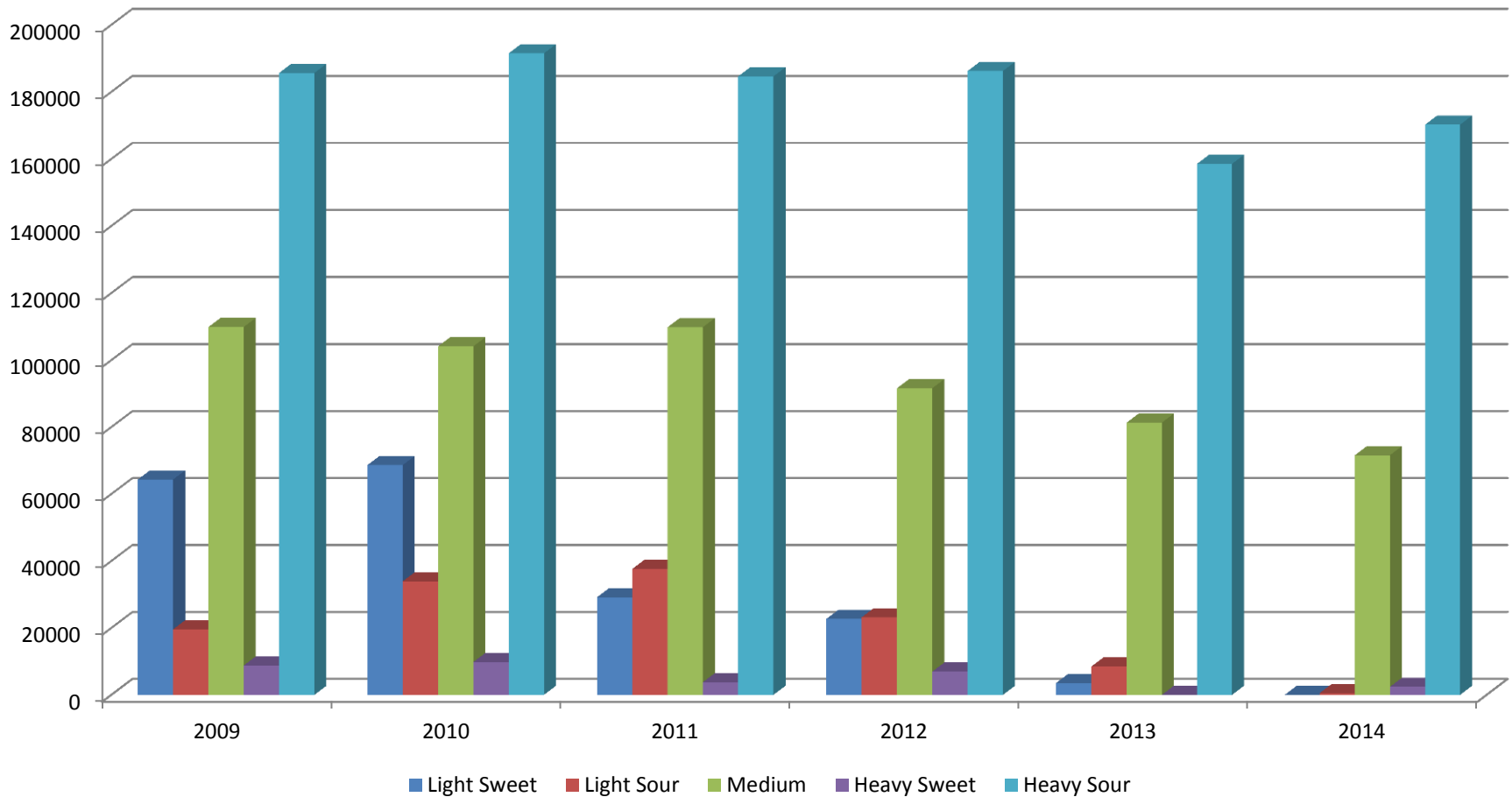


*Source EIA



Houston Crude Oil Imports by Quality

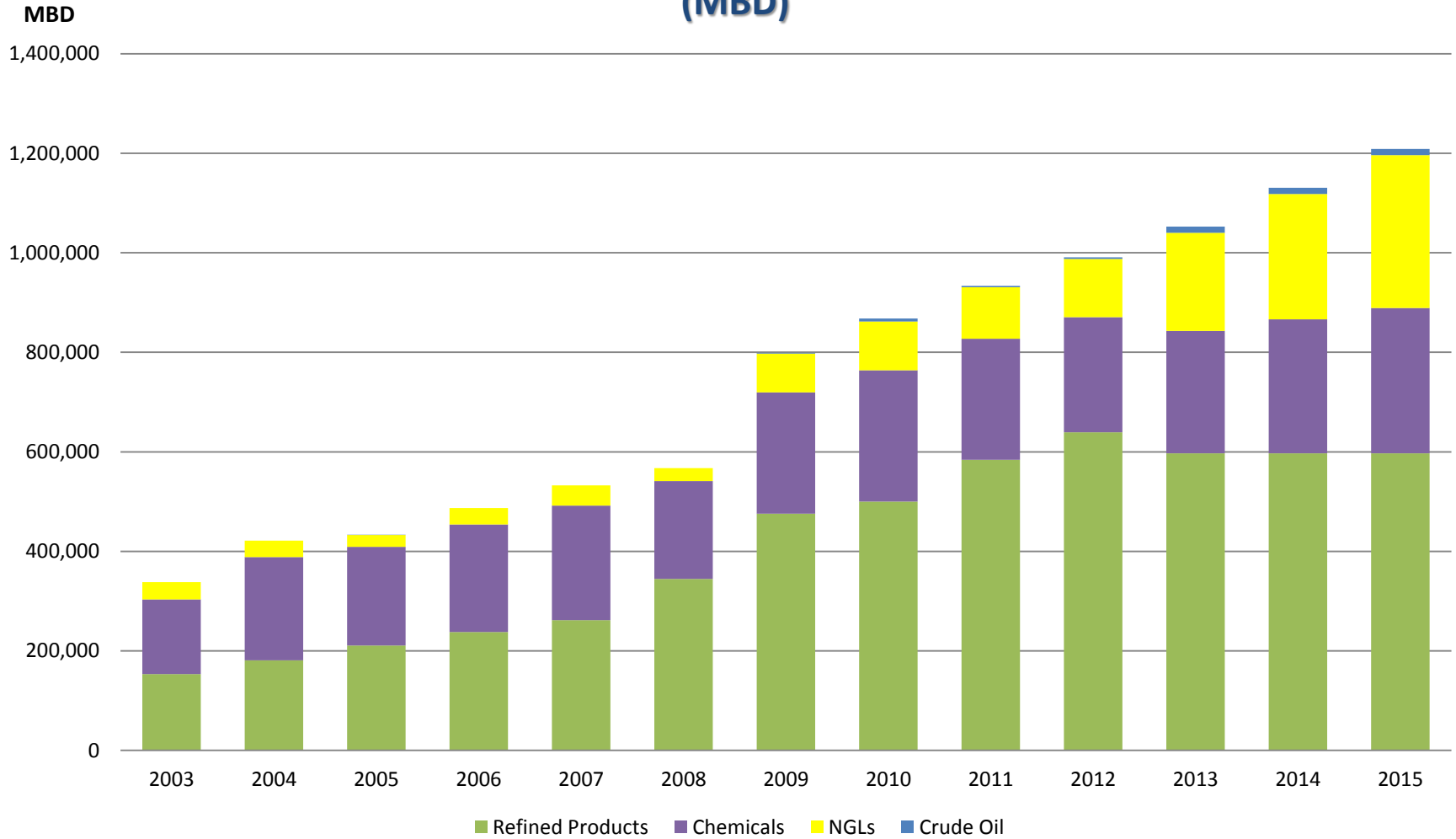
In thousands of barrels



*Source EIA 2015



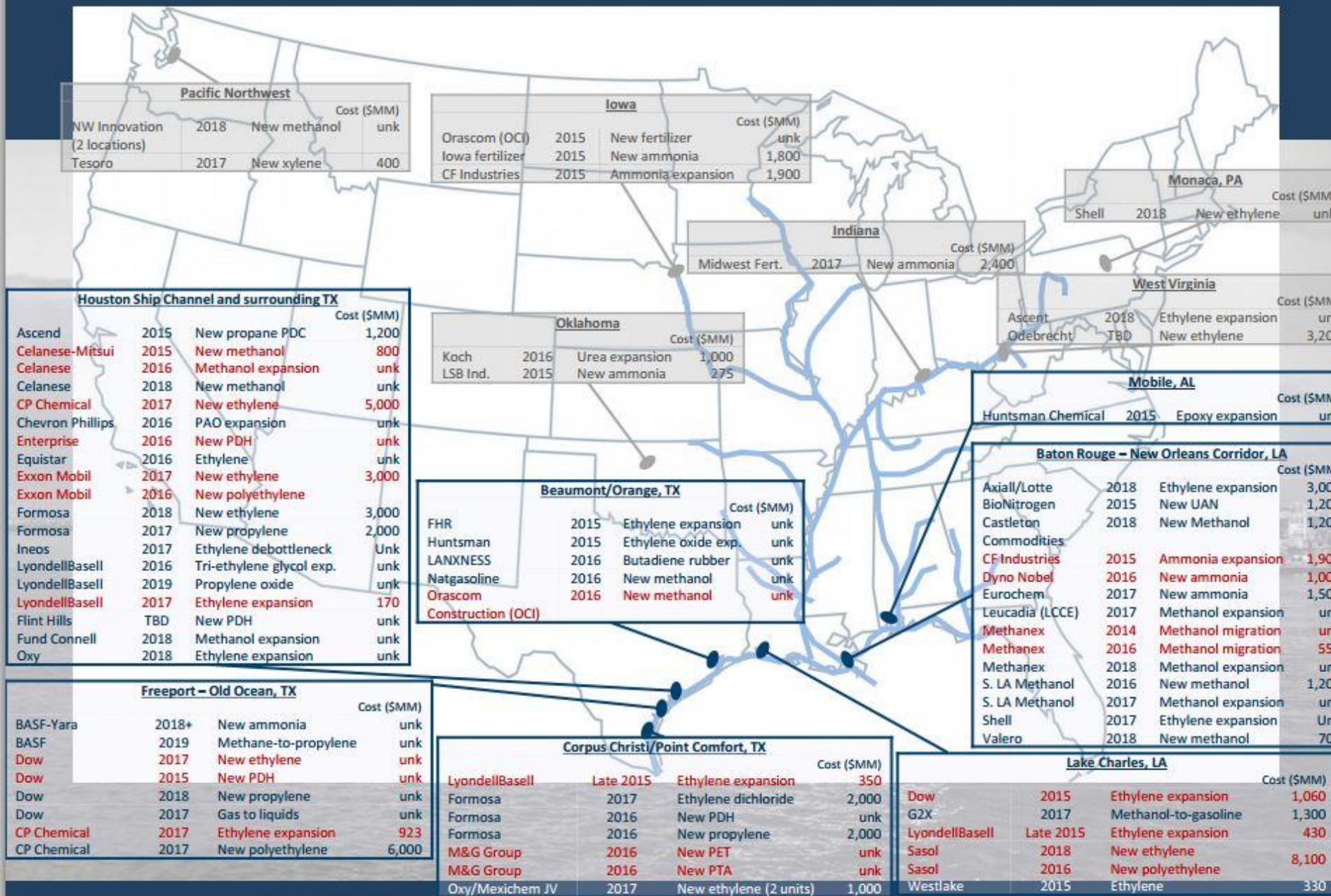
Estimated Petroleum Exports for the Port of Houston (MBD)



*Source Greater Houston Port Bureau, EIA



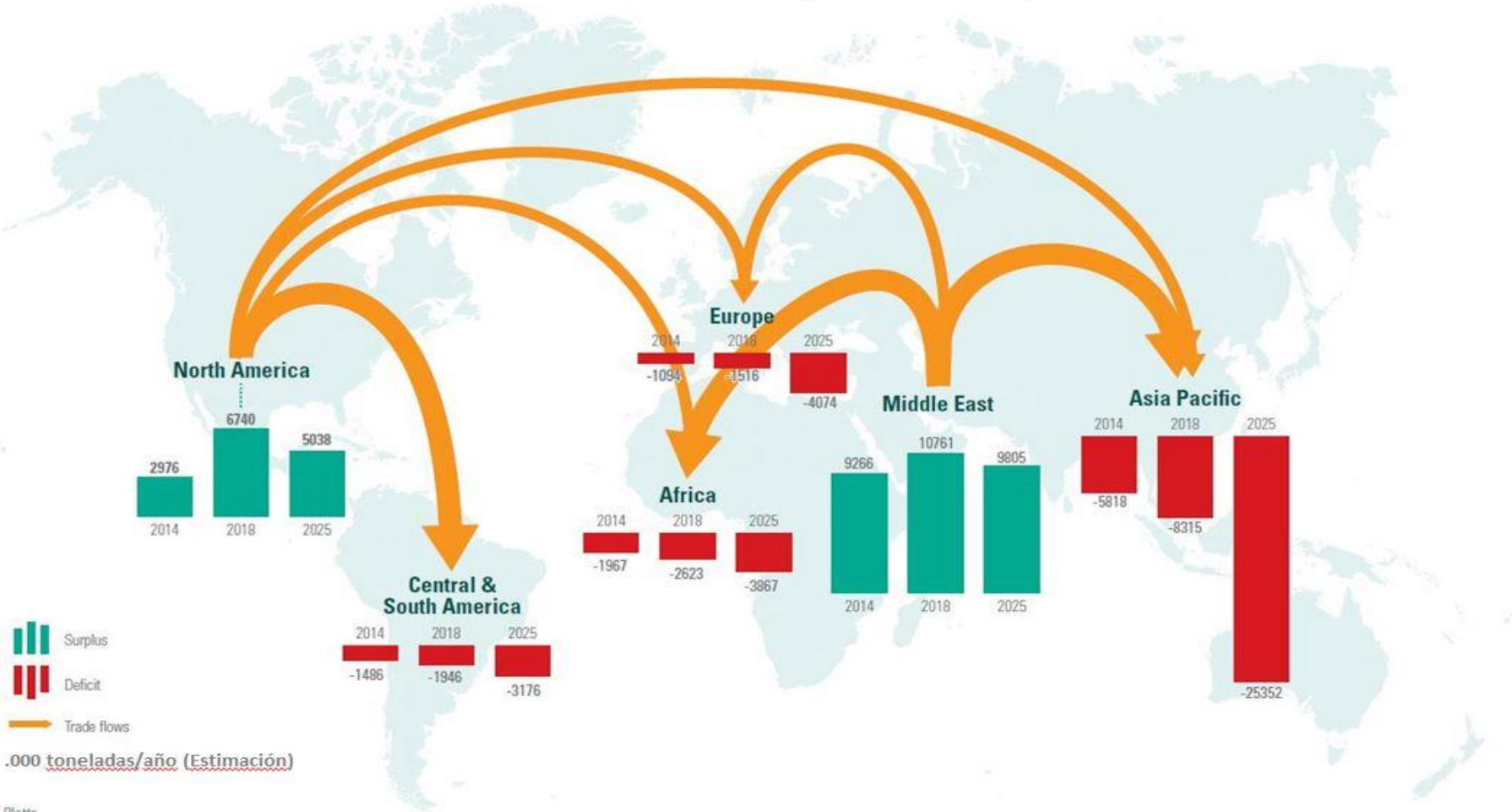
\$100+ Billion of Planned U.S. Petrochemical Investments*



*Notes: Date reflects anticipated year in-service, red font reflects construction in progress, unk=unknown

Sources: ICIS, Company announcements, Kirby Corp.

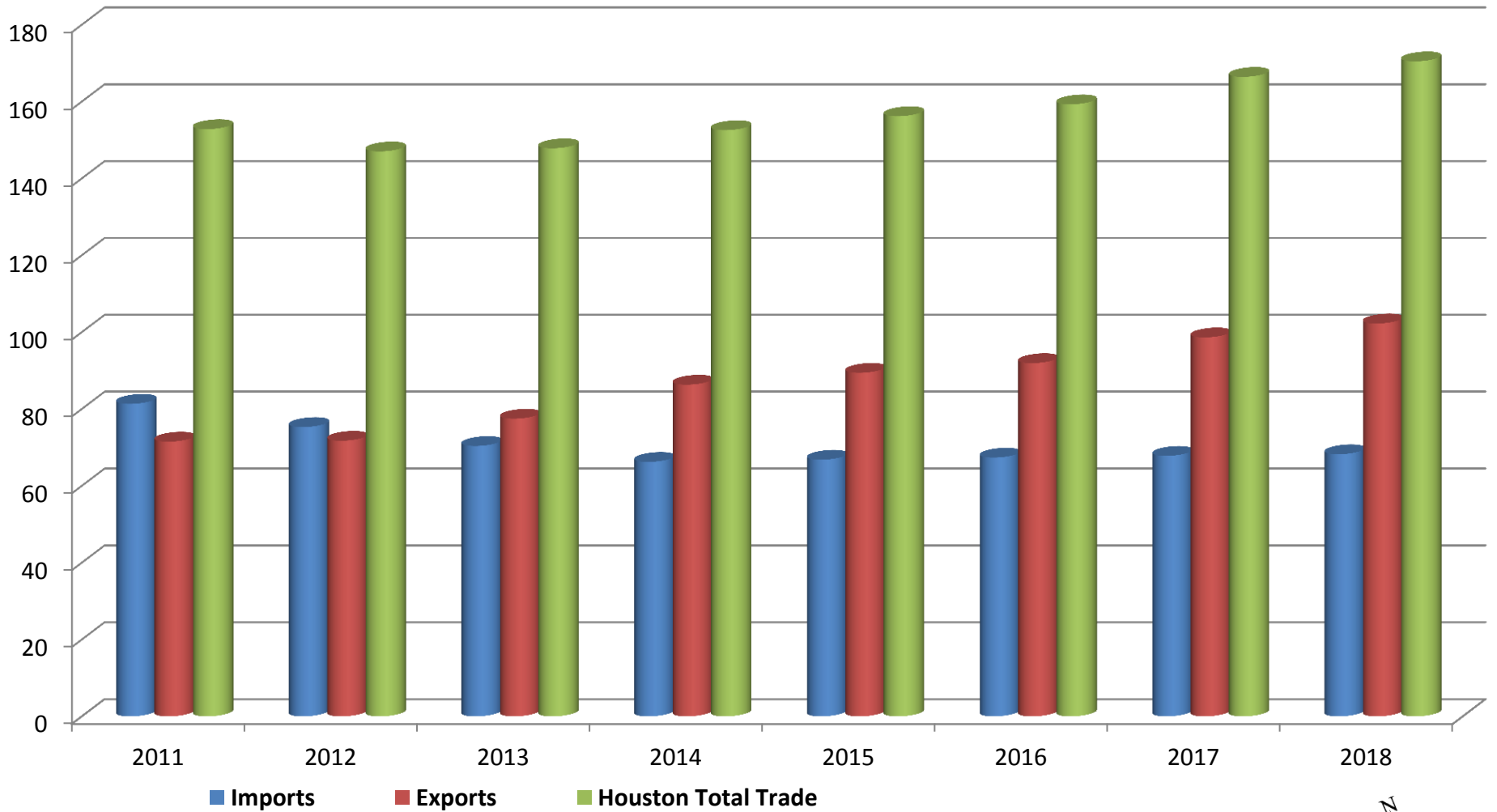
US Producers to Target Key Markets



Source: EIA, Platts



Waterborne Foreign Trade Houston - Millions Metric Tons



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?

