Promises and Perils: Port of Houston Poised for Growth
CAPT Bill Diehl USCG (Ret.), P.E., GHPB president

Houston CPA Society/Houston TSCPA Foundation
January 6, 2020
Largest Petrochemical Facility Complex in the U.S.

Port of Houston
Panama Canal

Expanded Locks-2016
Population and Energy Intensity

*Asia Has Room For Dramatic Growth vs. Low-Growth USA*

Source: EPD Fundamentals, World Bank

Oil/Condensate Production Forecast by Major Basin

*More than 80% of growth is from Permian and Eagle Ford*

Source: EPD Fundamentals

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U.S. NGL Production By Major Basin

NGLs: About 75% of NGL growth is from Permian and Eagle Ford... destined for the Houston area

Permian Producer Economics are Driven by the Oil Component

Includes 13 cents/MBtu on NGLs and 0.5-$/MMBtu for NGL boiler fuel.
US Producers to Target Key Markets

U.S. Oil & Gas Supply Growth

- Production growth is Gulf Coast centric
- Demand for hydrocarbon in the U.S. is not expected to grow
- E&P sector and Petchem industry have become dependent on exports

U.S. is home to some of the most cost-competitive hydrocarbons in the world

Source: EPD Fundamentals
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This Volume Growth Would Result in 2.5X Additional Ships For To Support Exports

Incremental Vessel Traffic to Enable Potential US Exports

Source: EPD Fundamentals

Houston Ship Channel Through Galveston Bay
Texas Chicken

Water Flow Around a Moving Ship

Low Pressure

High Pressure

Source: EPD Fundamentals

Harbor Lights

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Pronto
Port Call Optimization
Roll out plan Houston

2019 Executive Partners

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