



Marine Transportation System Capacity:

Bulk Liquid Terminal Issues

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Trends: More Calls by Larger Tankers

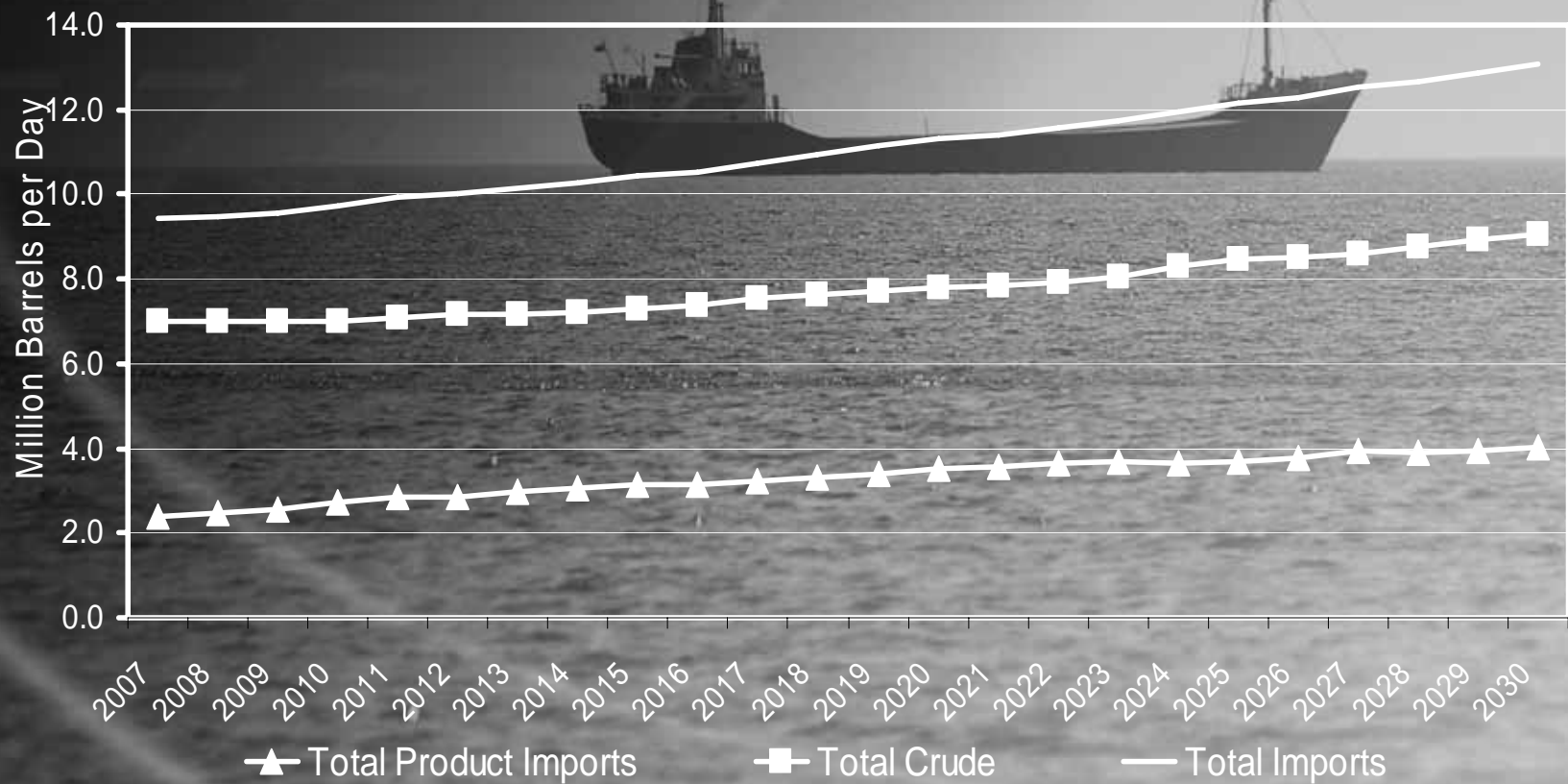
- Over the past 5 years (2001-2005):
 - Number of Calls by Tankers has increased by 9%
 - Average DWT of calling tankers has increased by 4%
 - Largest increase in calls in Gulf of Mexico (1,319 extra calls or 14.4%)

Top 10 Busiest Ports



	Port	Tanker Calls	% of All Tanker Calls
1	Houston	3392	17
2	Philadelphia	1534	8
3	New York	1380	7
4	Port Arthur	1270	6
5	New Orleans	1121	6
6	Texas City	1074	5
7	LA/Long Beach	1070	5
8	Corpus Christi	788	4
9	San Francisco	692	3
10	Freeport (Texas)	561	3

On the Radar: Rising Import Volumes



Are there Constraints?

- Largely Unknown
- California only state known to have looked at the issue

Findings from California – Crude Oil

- 2005 – An Assessment of California’s Petroleum Infrastructure Needs
 - Los Angeles Basin – sufficient capability through 2025
 - Bay Area – will likely need additional marine terminal capacity and accompanying storage equivalent to one average sized facility by 2025

Findings from California – Clean Fuels

- 2005 – An Assessment of California’s Petroleum Infrastructure Needs
 - Lack of available tankage - in both the Bay Area and the LA Basin - for clean fuels is the most serious potential constraint in the state’s marine infrastructure.

Issues raised by the California Report

- Competition for scarce land with other types of cargo handling (and the role of Port Authorities in allocating land)
- Dredging
- New CA Standards for Marine Terminals (MOTEMS)

Is This Unique to California?

- Power of Port Authorities not unique
- Dredging not unique (e.g. Arthur Kill, Delaware River, etc.)
- Will other states adopt MOTEMS?



Questions and Answers

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