The **Energy Port of the Americas**

- Independent political district of the State of Texas, governed by seven commissioners
- Large industrial energy hub & gateway to global markets
- A landowner, a land developer, and a landlord
- Economic development agency specializing in P3’s
No. 1 U.S. Crude Oil Export Gateway
4th Largest Port in the U.S. (>100mtpa)
$150B in Annual Economic Output
$100M / Day Goods Value Movement
Over $100M Annual Port Revenues
>$750M in Total Assets

* 2017 Statistics
$50 Billion Capital Investments
Texas: Largest Energy Producer in U.S.

U.S. Onshore Production of Crude Oil (in million barrels per day)

Source: Energy Information Administration
February 2018
Big Oil

The Oil Market is bigger than all raw metal markets combined.

Source:
Infomine, BA, World Gold Council
Jason Matthey, Cameco, Benchmark Mineral
Moving America’s Energy

U.S. crude oil export destinations (2017)

<table>
<thead>
<tr>
<th>Destination</th>
<th>Thousand Barrels per Day</th>
<th>Percent of U.S. Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>20%</td>
<td>29%</td>
</tr>
<tr>
<td>China</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>South Korea</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>2.7%</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>2.6%</td>
<td></td>
</tr>
<tr>
<td>Singapore</td>
<td>2.5%</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td>2.0%</td>
<td></td>
</tr>
<tr>
<td>India</td>
<td>1.9%</td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>1.5%</td>
<td></td>
</tr>
<tr>
<td>Curacao</td>
<td>1.4%</td>
<td></td>
</tr>
<tr>
<td>rest of world</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

EIA
Monthly U.S. Natural Gas Exports (2006-17)

Source: U.S. Energy Information Administration, *Natural Gas Monthly*
New Permian Crude Oil Pipelines

- Plains- Basin Expansion (+350) 800 Mb/d Q2-2019
- Enterprise- Midland-to-Sealy 300 Mb/d Q4-2017 (150 Mb/d Q2-2018)
- Enterprise- NGL Conversion 200 Mb/d 2020
- Energy Transfer- Permian Express III 100 Mb/d Q4-2017 (2018 Expansion)
- Magellan/Plains- BridgeTex Expansion (+40) 440 Mb/d Q1-2019
- Plains- Cactus II 585 Mb/d Q3-2019
- P66-Enbridge- Gray Oak 385 Mb/d 2H-2019
- EPIC- EPIC Crude 590 Mb/d 2H-2019
- Buckeye- South Texas Gateway 600 Mb/d 2020

Magellan – Un-named 350 Mb/d 2H-2019
Cheniere Energy
Corpus Christi Liquefaction: Update (July 2018)

- $15B investment
- Leader in U.S. LNG
- Overall Completion (Phase I): 89.9%
- Estimated impact of approximately $17B for Texas, during nine-year construction period
Benefits Achieved

- $150B in economic activity for the U.S.
- $50B in privately funded industrial projects
- Add nearly $35B annually in additional goods value exports
- Reduce the current U.S. trade deficit
- Over $100M in annual transportation cost savings
- Support announced pipelines
- Energy dominance
Harbor Island

- **Project studies** are underway to evaluate public terminal location on Port-owned property as well as deepening the Entrance Channel from the Gulf of Mexico through Harbor Island to La Quinta Junction
  - **AECOM** is conducting Channel Deepening Feasibility & Environmental Study
  - **Wood Group** is master-planning dock and terminal at Harbor Island
- **Public involvement** will be encouraged throughout the process; first opportunity will be in mid-September
The Future of Energy Exports

- Larger, more efficient vessels
- Safer and reduced environmental impacts
- Eliminate current reverse lightering operations
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