US Crude Oil & Natural Gas Production
Port Corpus Christi
2017 Statistics

- The #1 US Crude Oil Export Port
- 4th Largest Port in the US (>100M Tons)
- USD $150B in annual economic output
- USD $100M goods value movement per day
- Greater than USD $100M annual port revenues
$50 BILLION INDUSTRIAL INVESTMENTS
$10 BILLION FOREIGN DIRECT INVESTMENTS
All Energy “Roads” Lead to Corpus Christi

Various Y-Grade NGL pipelines from Permian Basin and Eagle Ford Shale planned for the region including:

- EPIC Pipeline
- Permico Energia Pipeline
- Grey Oak Pipeline
- Plains Cactus II Expansion

Major Natural Gas Lines to Corpus:

- Cheniere LNG
- Enterprise
- Southcross
U.S. CRUDE OIL EXPORTS
Big Oil

The Oil Market is bigger than all raw metal markets combined

Source:
Infomine, BA, World Gold Council
Jason Matthey, Cameco, Benchmark Mineral
Permian basin to account for nearly 50% of US onshore production by mid-2020s

**US Lower 48 crude and condensate production**

- Other
- Eagle Ford
- Bakken
- Niobrara
- SCOOP-STACK-Cana
- Permian (incl. Conventional)

Source: Wood Mackenzie
Texas: Largest Energy Producer in U.S.  
(in million barrels per day)

U.S. Onshore Production of Crude Oil

Source:  
Energy Information Administration  
February 2018
Reduced transport costs and higher netbacks for US crude producers make Europe the optimal market for the US to fill first.

Destination of US light crude and condensate exports
Corpus Christi Outbound Crude Exports 2016-2018 (Barrels Per Day)

Barrels Per Day (BPD)

Exports
- Jan'16: 11%
- Feb'16: 2%
- Mar'16: 23%
- Apr'16: 13%
- May'16: 8%
- Jun'16: 25%
- Jul'16: 10%
- Aug'16: 28%
- Sep'16: 48%
- Oct'16: 37%
- Nov'16: 36%
- Dec'16: 44%
- Jan'17: 51%
- Feb'17: 49%
- Mar'17: 55%
- Apr'17: 64%
- May'17: 64%
- Jun'17: 48%
- Jul'17: 49%
- Aug'17: 73%
- Sep'17: 73%
- Oct'17: 73%
- Nov'17: 73%
- Dec'17: 68%
- Jan'18: 73%
- Feb'18: 68%
- Mar'18: 77%
- Apr'18: 80%

Domestic
- Jan'16: 73%
- Feb'16: 49%
- Mar'16: 48%
- Apr'16: 64%
- May'16: 55%
- Jun'16: 64%
- Jul'16: 49%
- Aug'16: 51%
- Sep'16: 44%
- Oct'16: 49%
- Nov'16: 48%
- Dec'16: 62%
- Jan'17: 68%
- Feb'17: 73%
- Mar'17: 73%
- Apr'17: 68%
- May'17: 73%
- Jun'17: 68%
- Jul'17: 73%
- Aug'17: 62%
- Sep'17: 68%
- Oct'17: 73%
- Nov'17: 73%
- Dec'17: 62%
- Jan'18: 68%
- Feb'18: 73%
- Mar'18: 77%
- Apr'18: 80%
Corpus Christi Expected to have Highest % of Crude Exports

**Forecast export volumes of US light crude by export hub (kb/d)**

Nearly 2.2 million b/d forecast exports will pressure the expected 2.3 million b/d export capacity in Corpus. Additional infrastructure needed.

**US light crude export hub market share %**

Proposed Marine Terminal Investments in Corpus Christi Could Bring Total US Crude Export Capacity to 4.6 mmbd by 2021

PORT CORPUS CHRISTI
SHIP CHANNEL
IMPROVEMENT PROJECT
Implementation of Channel Improvement Project

Project Construction Schedule:
- FY 2018
- FY 2019
- FY 2020
- FY 2021

- Extend La Quinta Channel 7,400 ft at -41' MLLW, ADM. Executed and Deepened to -47' MLLW by PCCA (Completed)
- Deeper Inner Harbor to -54' MLLW
- Upper Bay Reach: Widen from 400' to 530' and add barge shelves
- Breakwater & Shore Protection (Completed)
- Lower Bay Reach: Widen from 500' to 530'
- Deeper from -47' to -54' MLLW

Future Project Contracts:
- Planned levels of contracts to construct remaining elements of Channel Improvement Project.

- Completed Project Elements
- Existing Dredge Material Placement Areas
- New Dredge Material Placement/Beneficial Use Sites
Harbor Island – Future Deep Draft Crude Export Terminal

-75' MLLW Project Scope

Corpus Christi Ship Channel
-47' MLLW; Authorized to -54' MLLW
PORT CORPUS CHRISTI

PILLARS OF SUCCESS

Job Creation & Economic Development
Environmental Stewardship & Sustainability
Educational & Workforce Development
Safety & Corporate Social Responsibility

PORT CORPUS CHRISTI EXPECTATIONS FROM INDUSTRY PARTNERS – DELIVER WHAT YOU PROMISE