



GAS EXPORTS TO MEXICO

WHAT'S DRIVING MEXICAN IMPORTS

- **Mexico Energy Reform**
 - Constitutional amendments in December of 2013 establish new industry rules for oil, natural gas, and electricity.
 - This sweeping reform of the energy sector brings an end to the longstanding control the state monopolies have had.
 - Provides a competitive and transparent energy market that is attractive to foreign investment.

KEY PLAYERS IN THE ENERGY REFORM

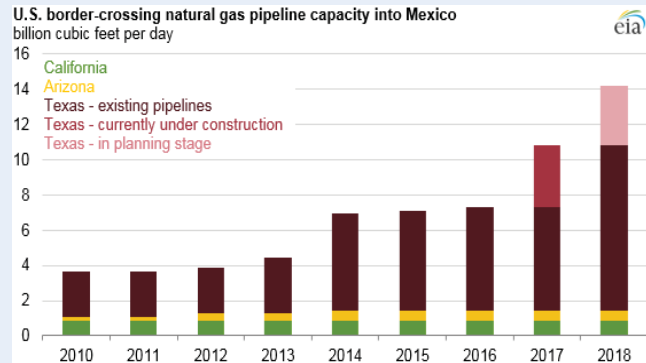


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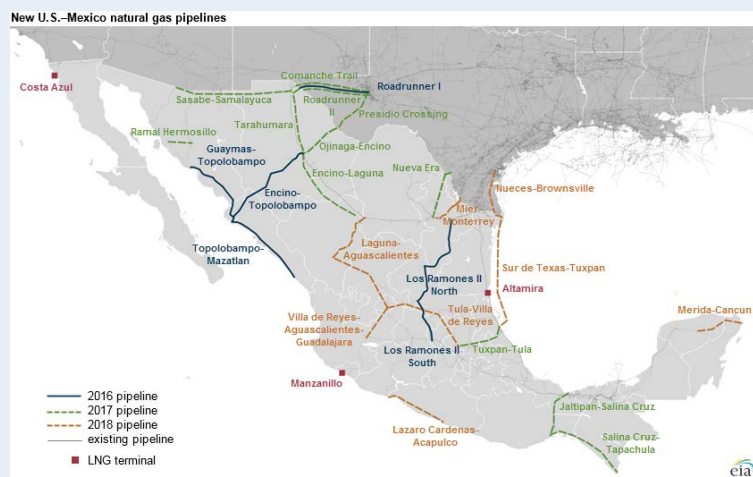
- PEMEX – Mexican state owned petroleum company. Historically responsible for all aspects of the petroleum industry in Mexico.
- CFE – Mexican state owned electric utility. Responsible for the operation and development of the electric industry in Mexico. Responsible for most of the new pipeline build out to supply electric generation facilities.
- CENEGAS – Mexican state run company responsible for operating and managing the transportation and storage of natural gas in Mexico. Inherited over 5,500 miles of pipelines from Pemex.

PIPELINE CAPACITY TO MEXICO

- Current capacity of 7 Bcf/d
- Expected to double to 14 Bcf/d in next 2 years
- All new projects originate in Texas
- Changes U.S. natural gas supply and demand dynamics



NEW PROJECTS



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