

Sittin' on the Dock of the Bay

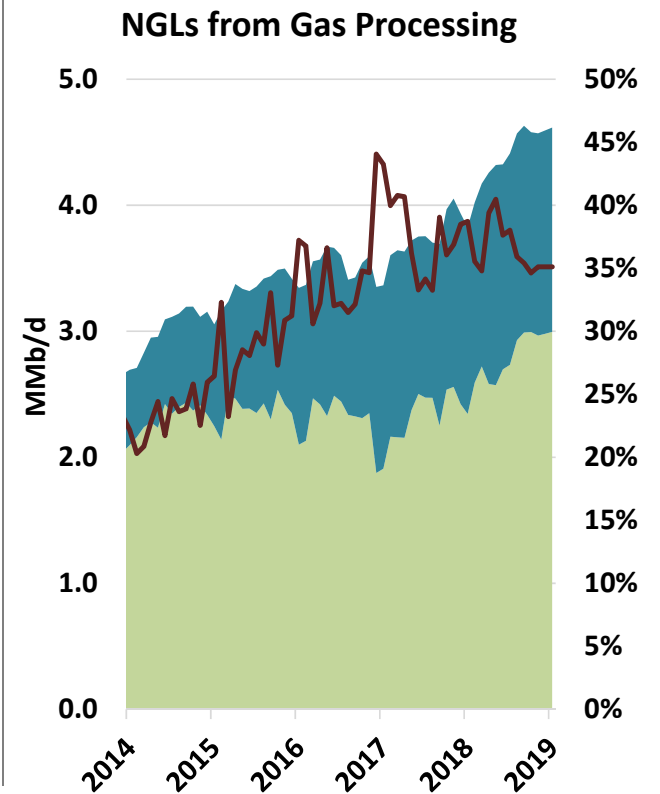
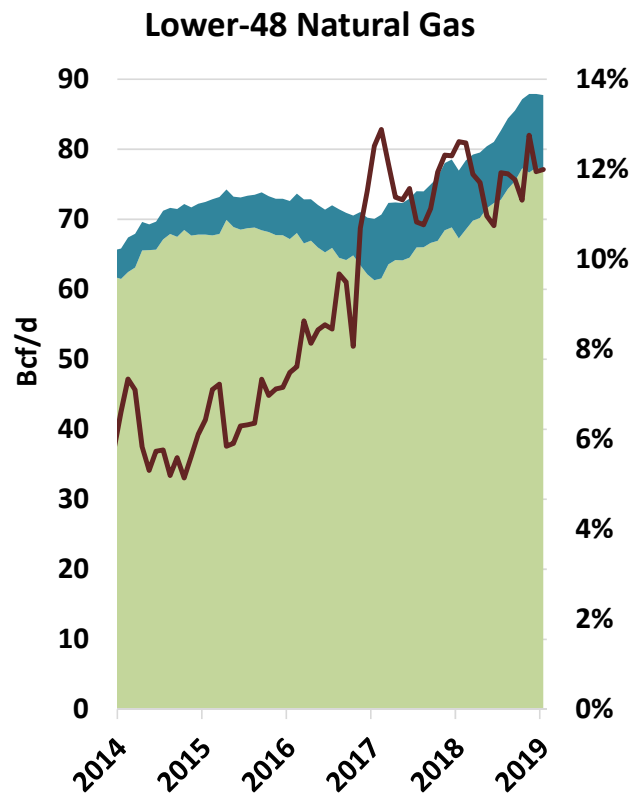
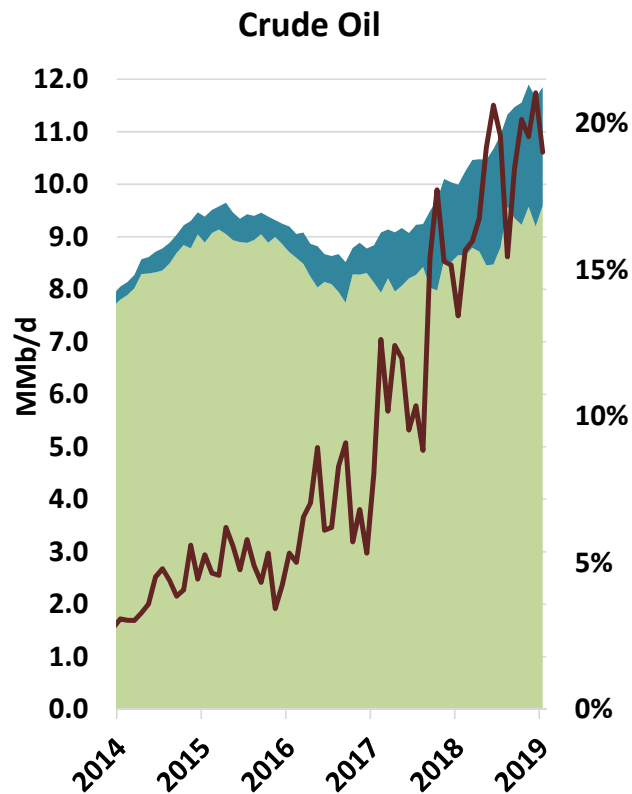
U.S. Oil Export Tsunami: Implications for Flows and Infrastructure

CSIS

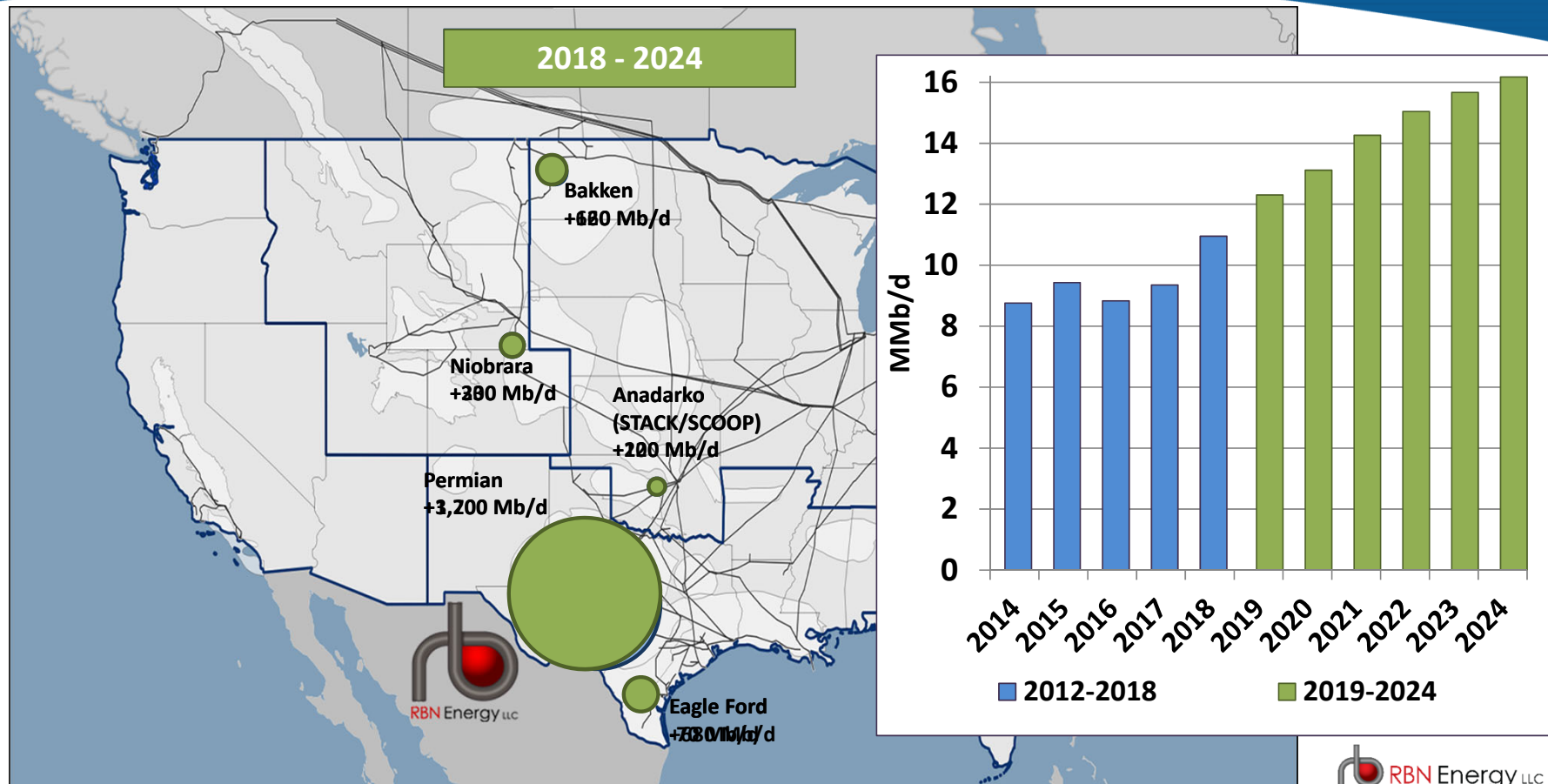
CENTER FOR STRATEGIC &
INTERNATIONAL STUDIES

February 21, 2019

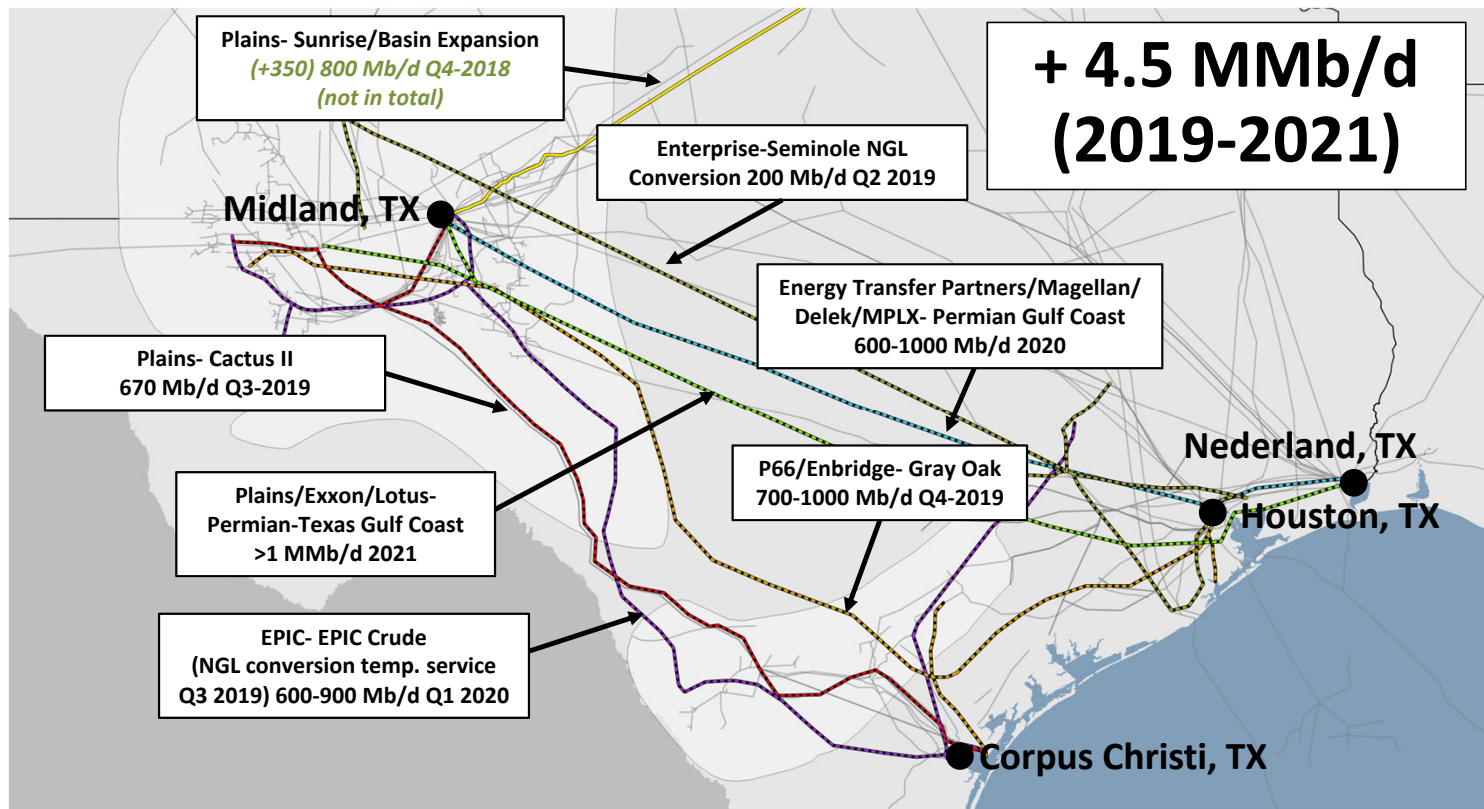
Crude/Gas/NGL Production, Exports, and % Exports



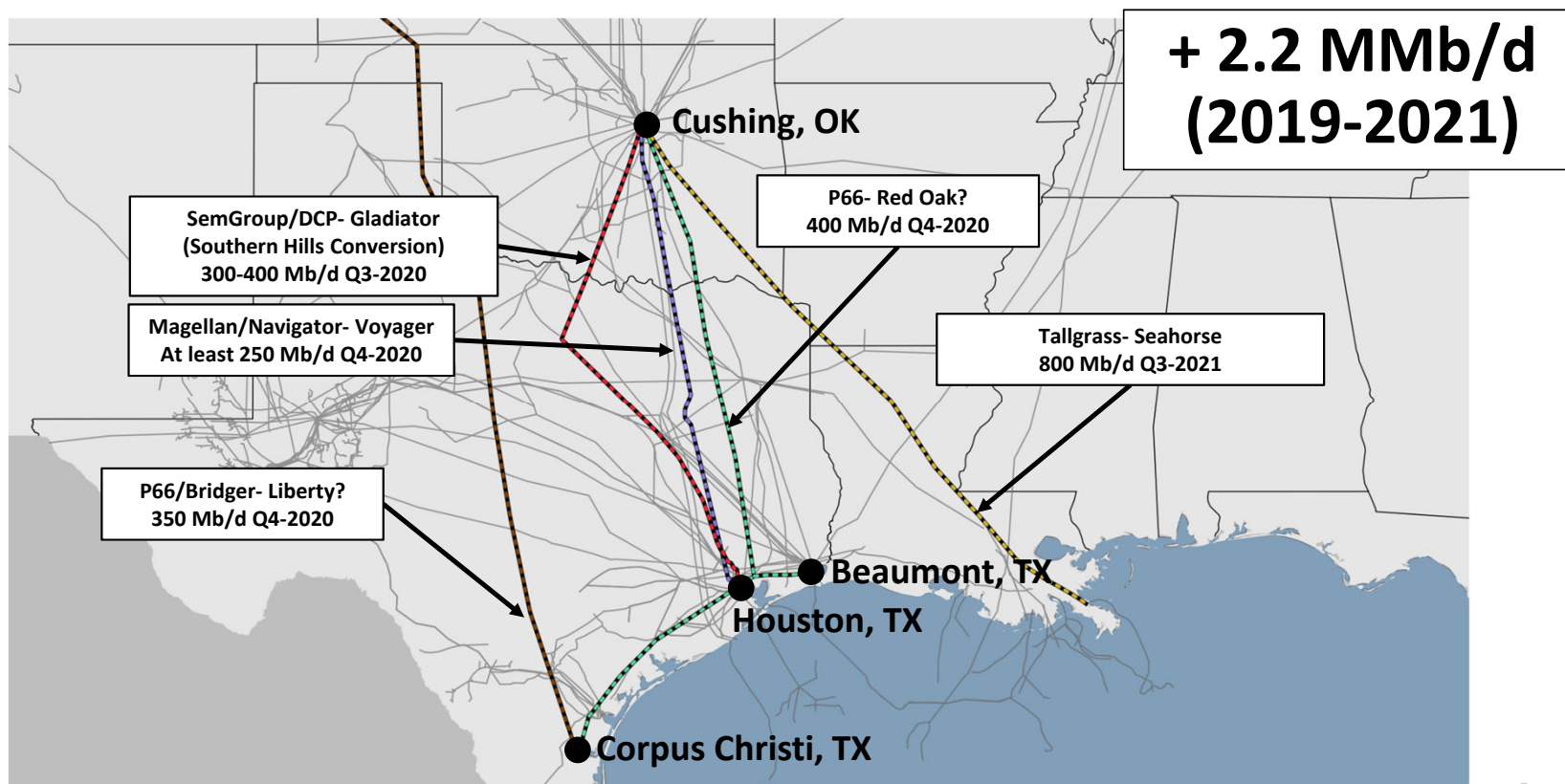
Oil Production History/Forecast by Basin



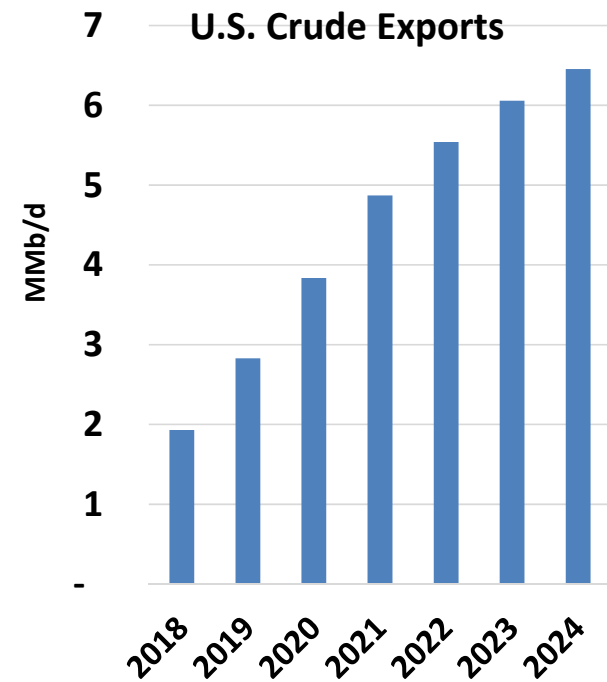
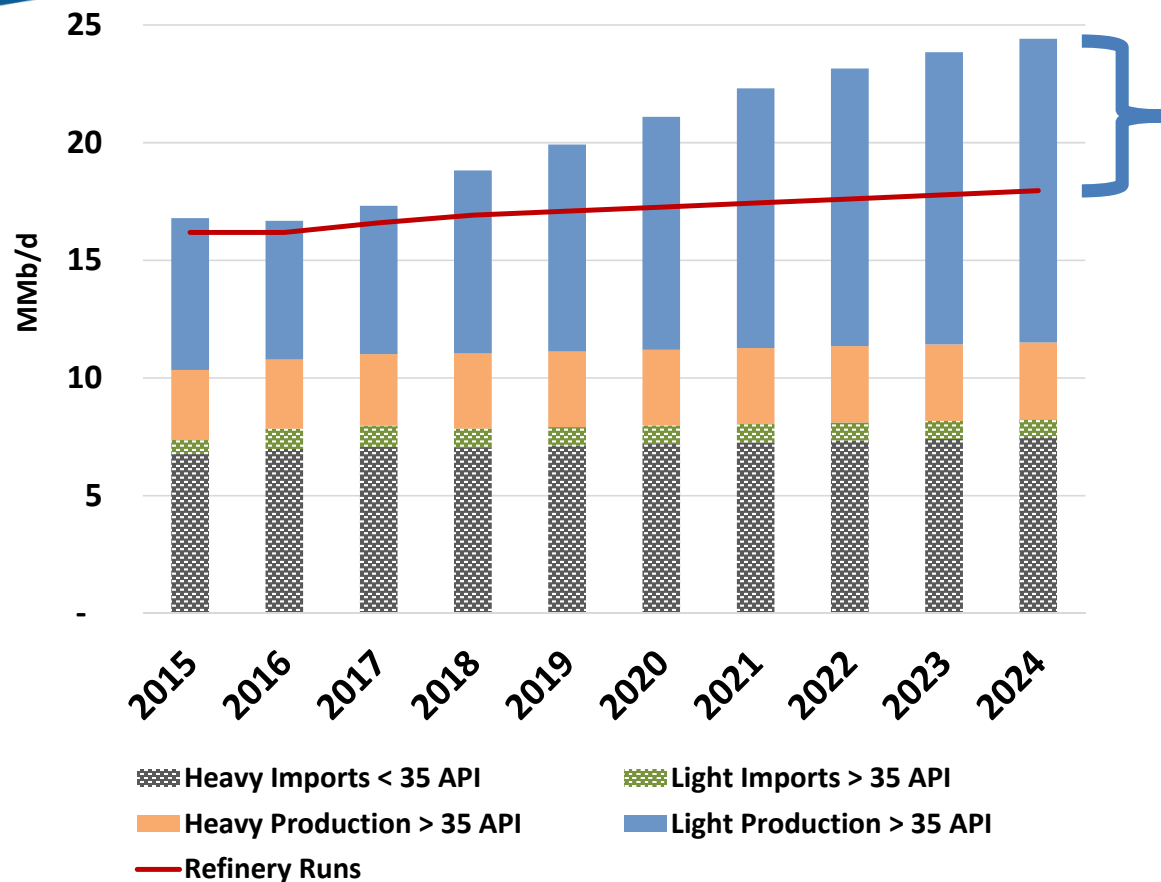
Permian Crude Oil Pipeline Projects



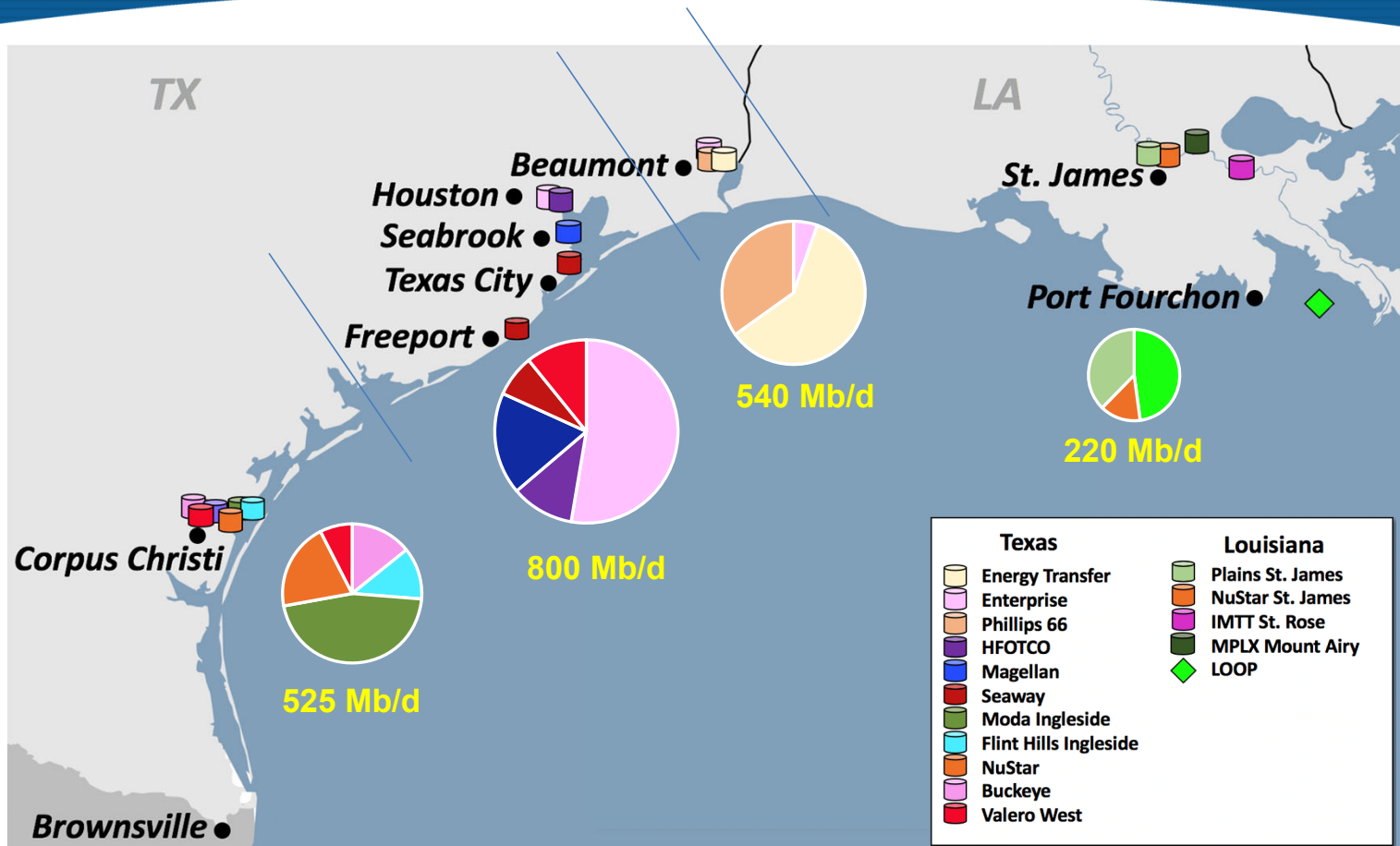
Midcon Crude Oil Pipeline Projects



U.S. Crude Oil Supply/Demand/Export Balance



Crude Oil Exports By Facility (YTD 2019 2.1 MMb/d)



Gulf Coast Crude Terminals – Greenfield & Expansions

Over 12 MMb/d of Additional Crude Export Capacity Planned



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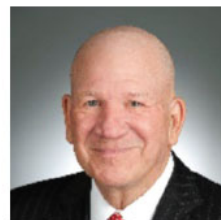
- » U.S. crude oil production will continue growing, up about 5 MMb/d over last year by 2024
- » Most of this incremental production is destined for Gulf Coast export markets; Enough pipelines will be built to make that happen
- » Enough dock capacity will be available to export all of the barrels that the global market can absorb

RBN Energy xPortCon – Conference May 21st



rbnenergy.com/xportcon

**What's Next for U.S. Exports? Crude, Gas, and NGLs.
Houston, TX
Hilton Americas Hotel
May 21, 2019**



Jim Teague
Chief Executive Officer
Enterprise Products



Khalid Muslih
Executive VP
Buckeye Partners



Octávio M.C. Simões
President & CEO
Sempra LNG
& Midstream



Jarl Pedersen
Chief Commercial
Officer
Port Corpus Christi



Tim Roberts
Executive VP,
Midstream
Phillips 66



Bo McCall
Chief Executive Officer,
Moda Midstream, LLC