



MEXICO'S MAIN EVENT  
FOR THE NEW ENERGY MARKET  
31 JANUARY TO 2 FEBRUARY  
● ● ● CENTRO BANAMEX, CDMX

# GULF COAST REGION REFINING US vs. Mexico Competitive Trends

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ORGANIZED BY:



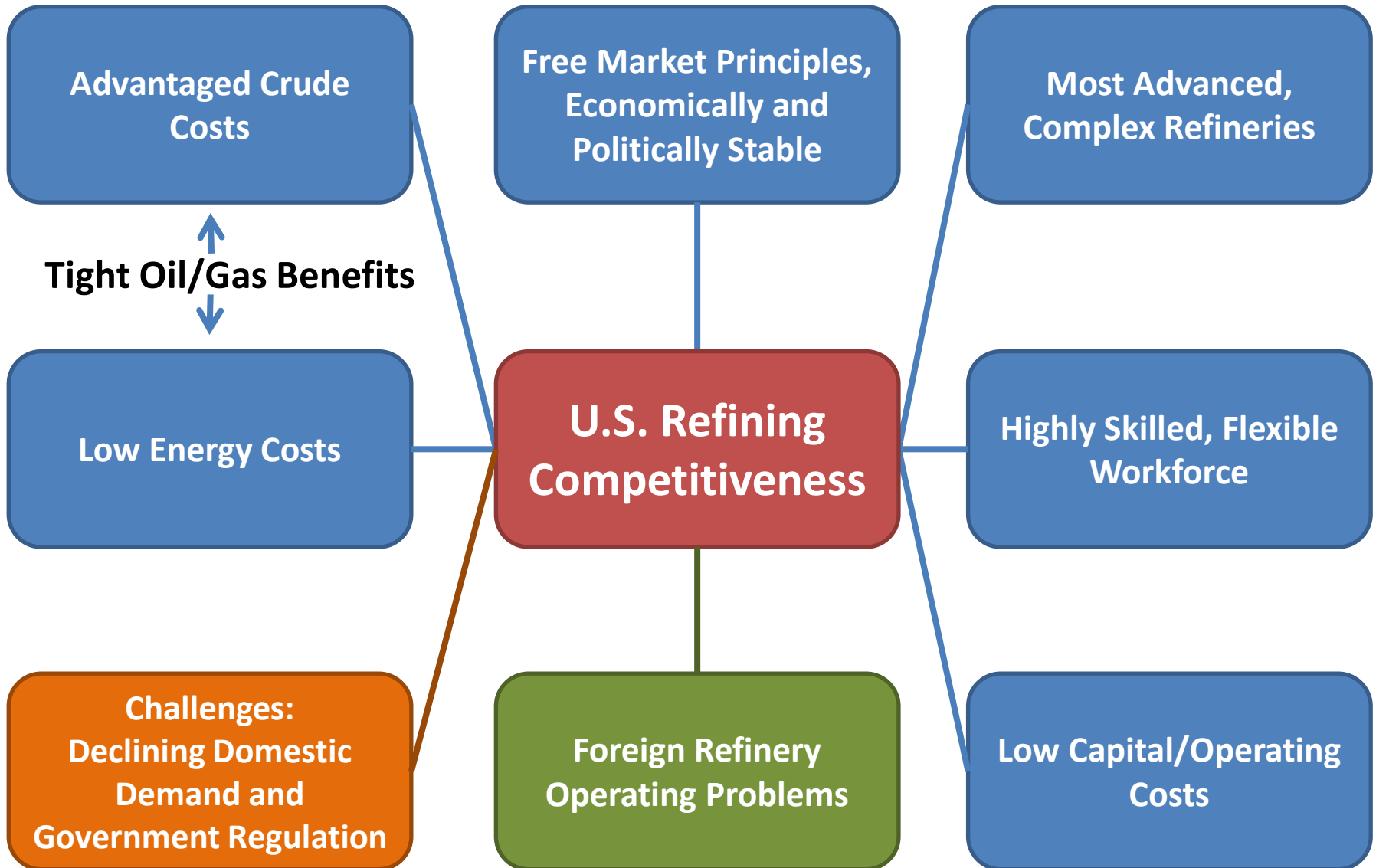
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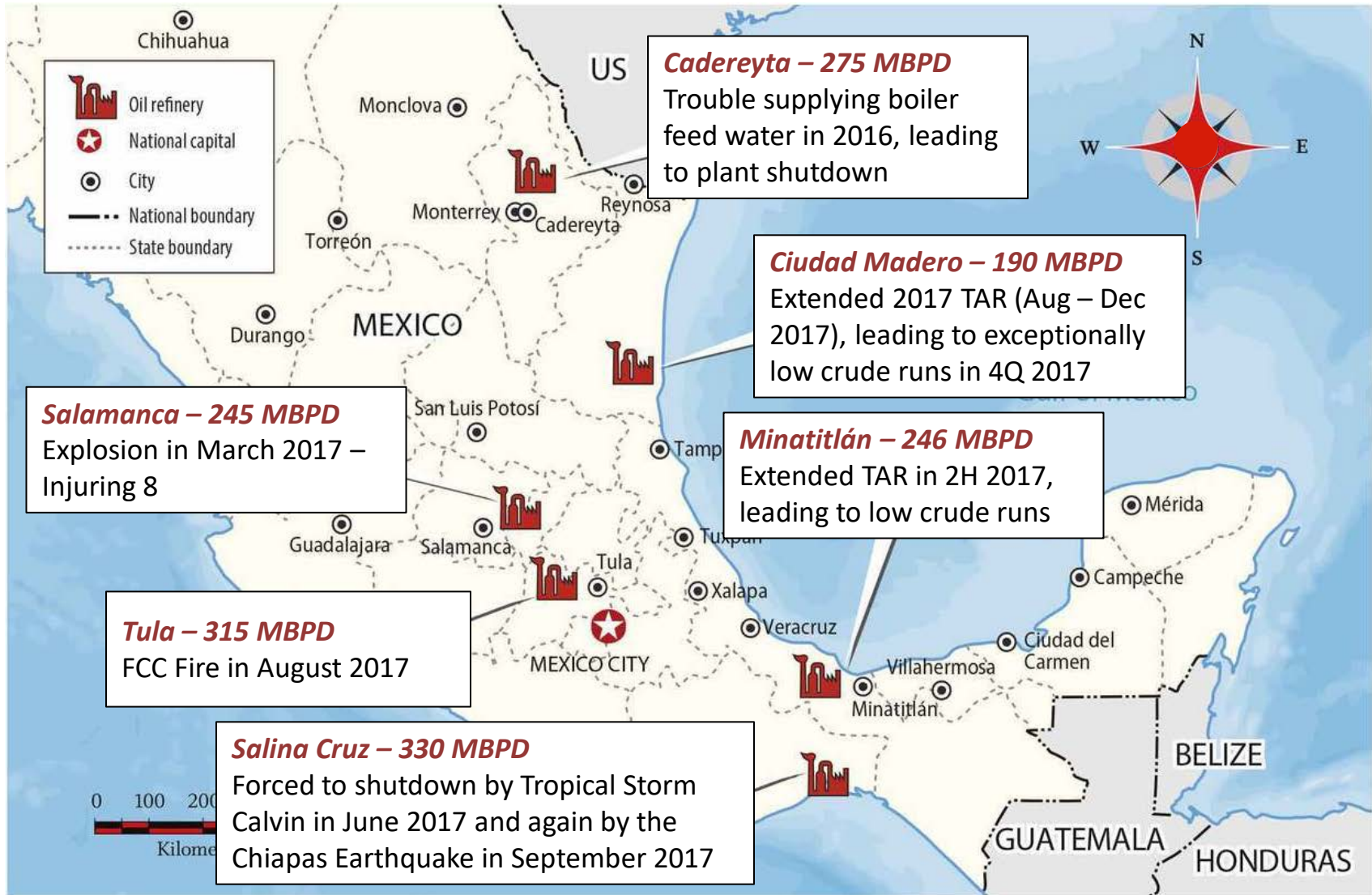
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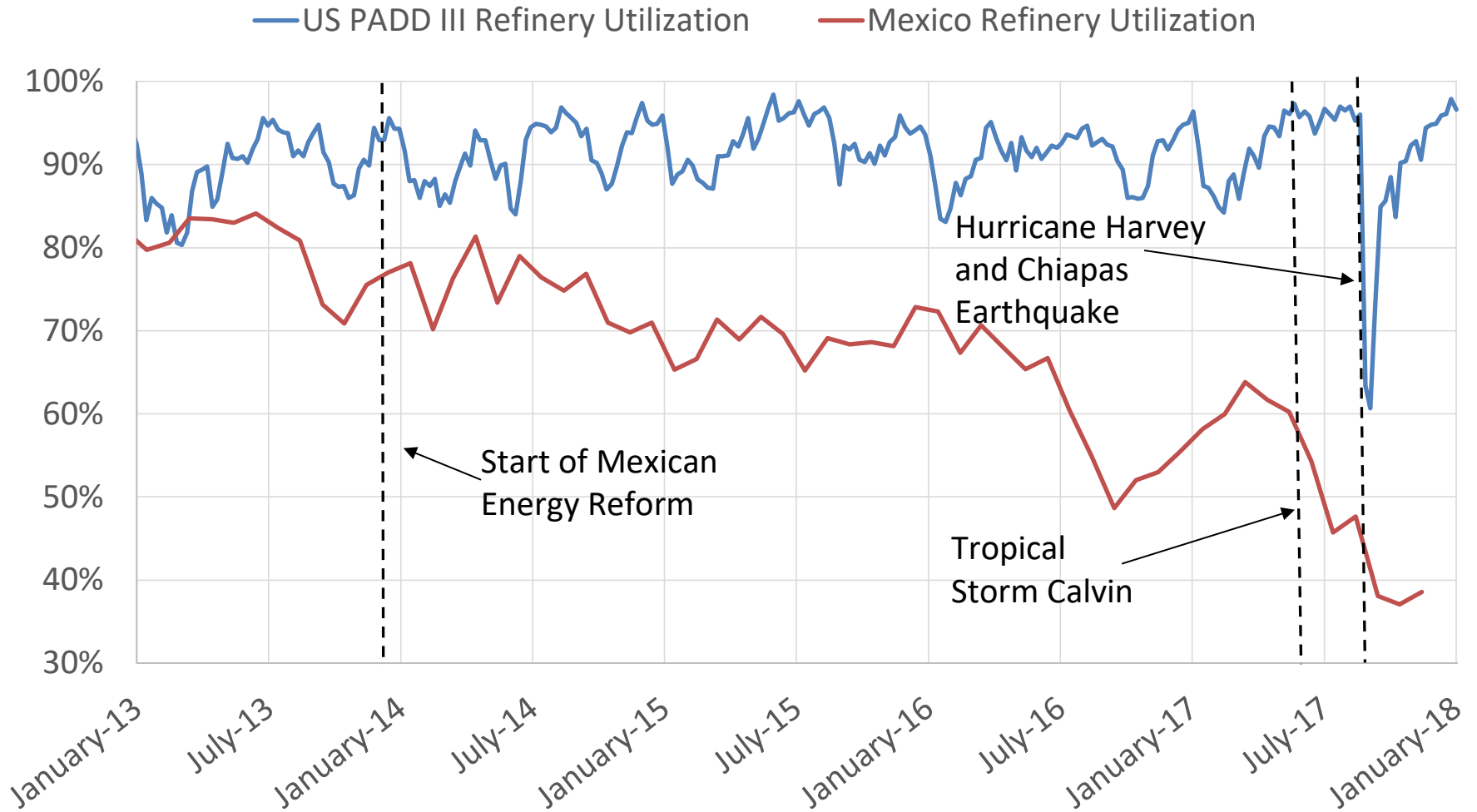
# U.S. Refineries Become Globally Dominant



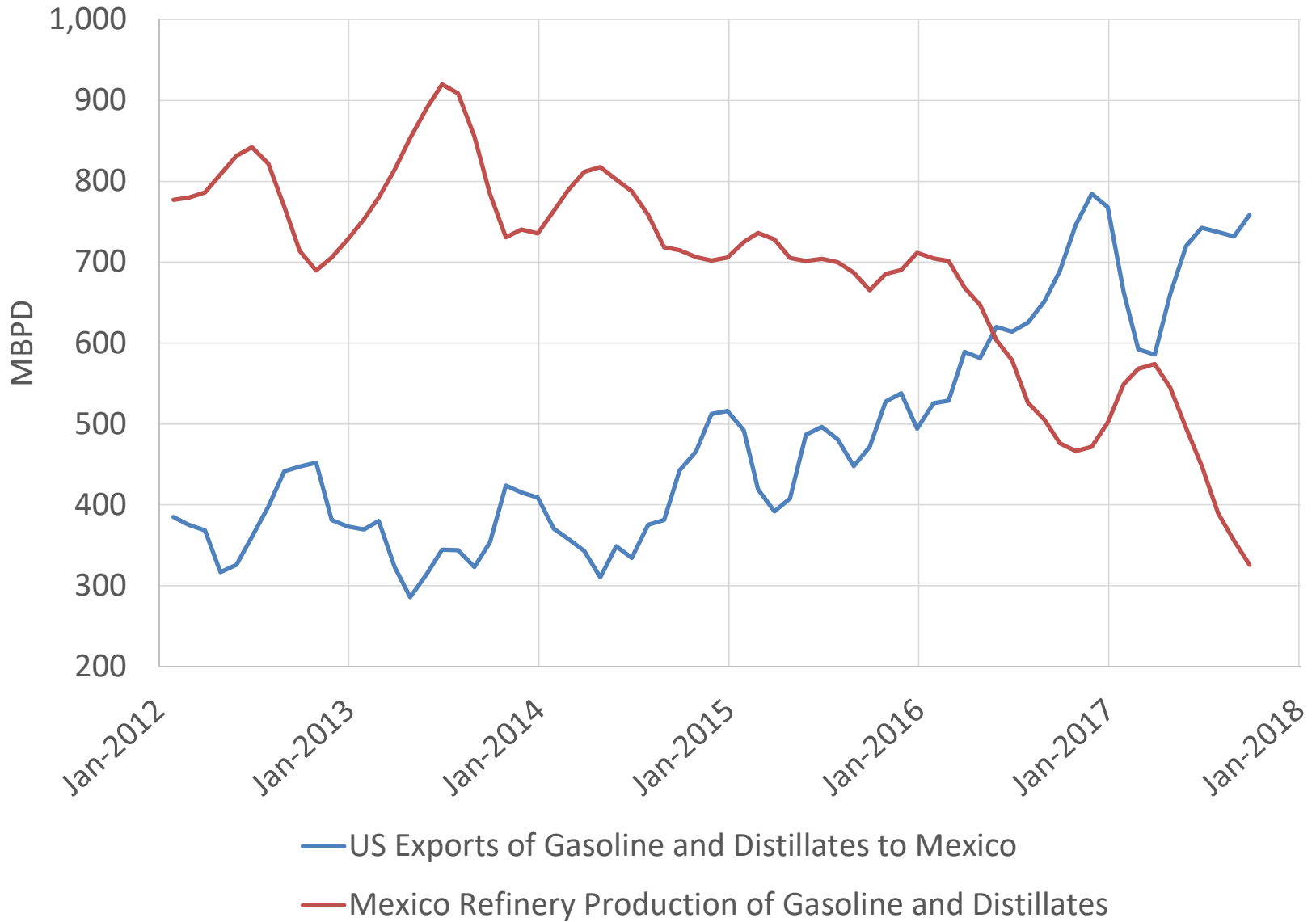
# Mexican Refining Woes



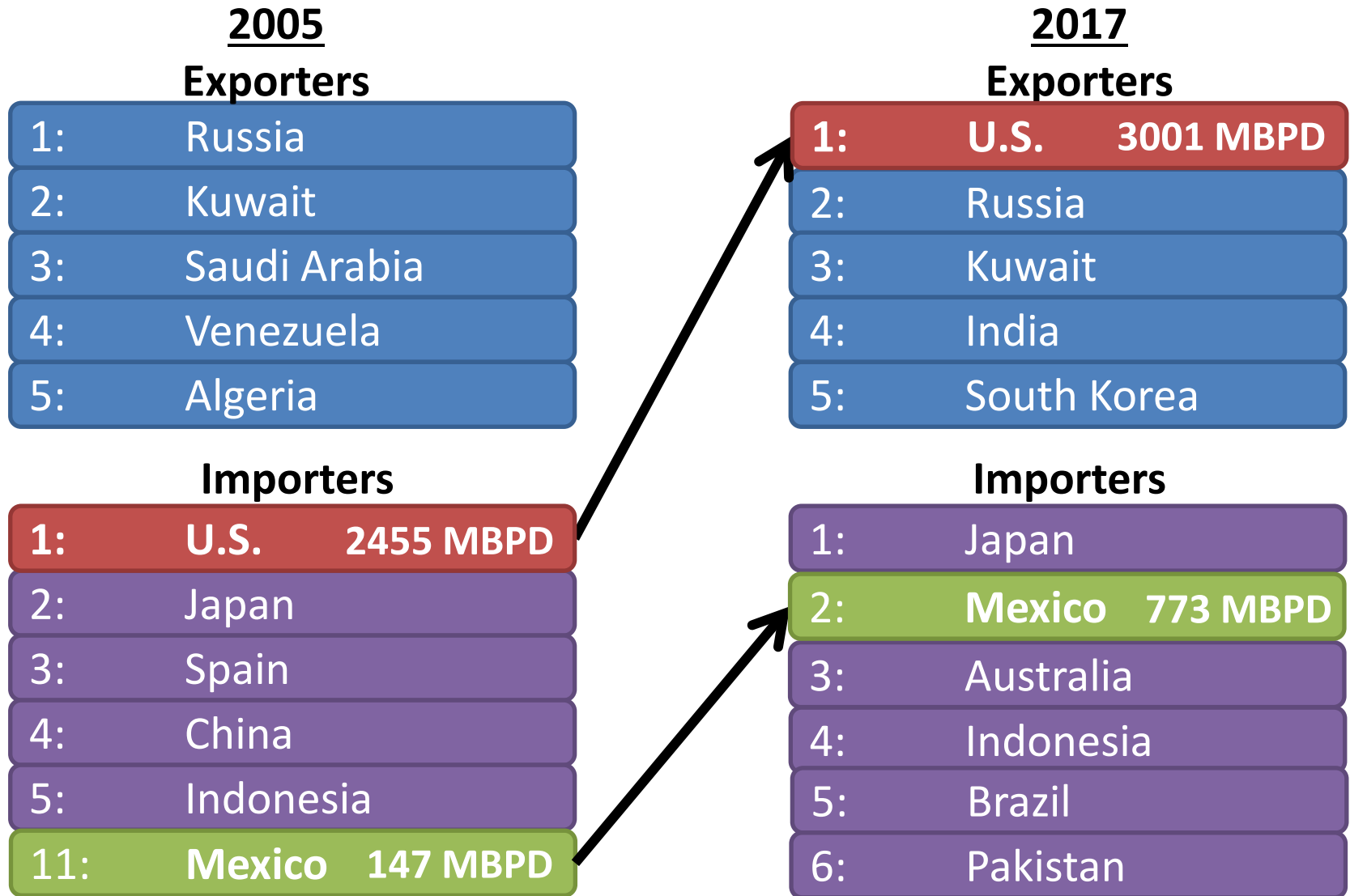
# USGC vs Mexico Refinery Utilization



# U.S. Imports Growing as Mexican Production Falls



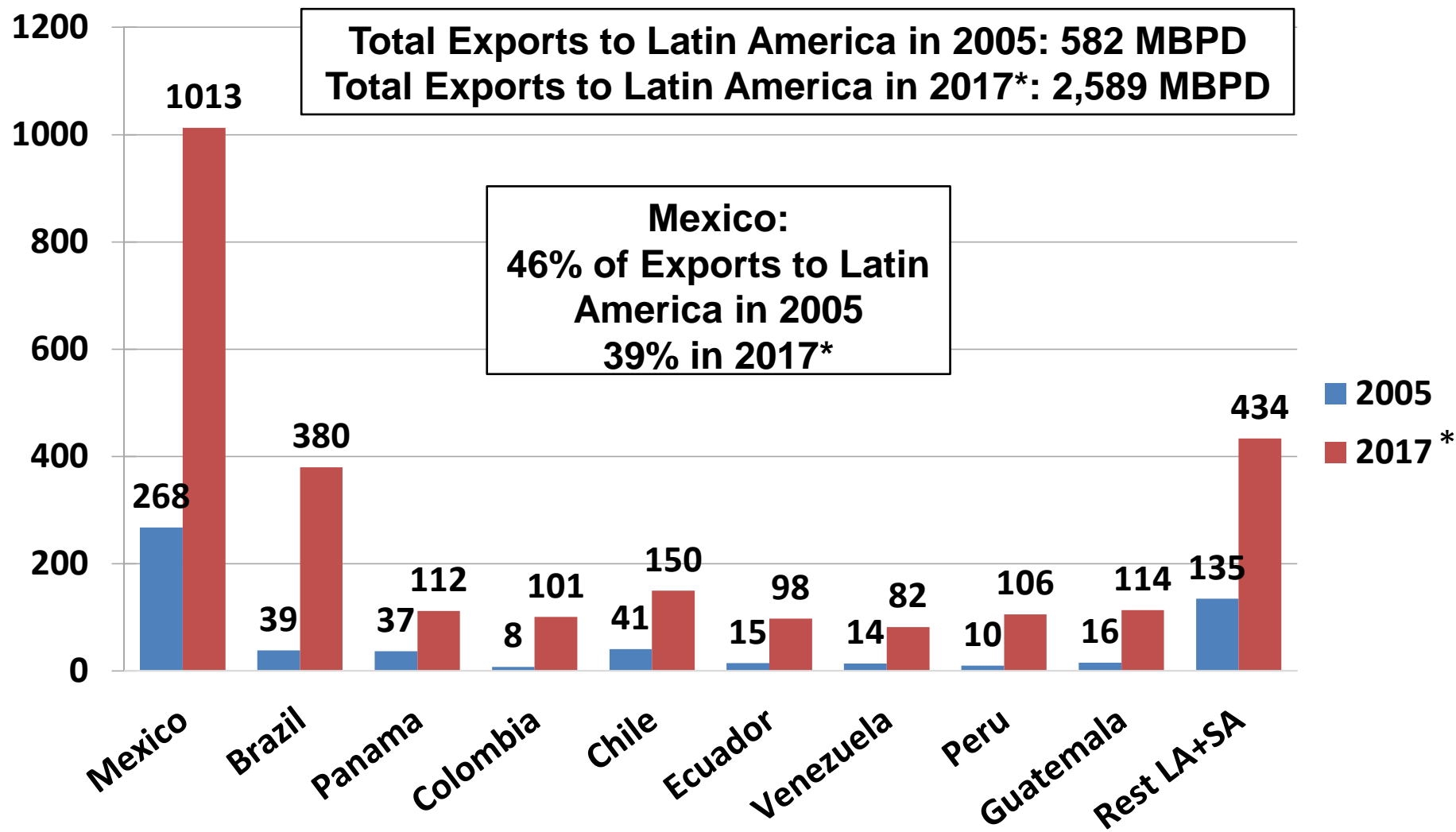
# U.S. Becomes Net Product Exporter; Mexico Grows Dependence



\*All Values Represent Net Imports / Exports

Source: EIA/IEA/Pemex/JODI

# Latin American Has Been Primary Destinations for U.S. Product Exports



\*November 2016 - October 2017

Source: EIA

# Mexican Refineries versus U.S. Gulf Coast (PADD III)



## Mexico



**# of Refineries: 6**

**Total Capacity: 1540 MBPD**

**Average Size: 257 MBPD**

**Total Coking: 156 MBPD, 10%**

**Total Cracking: 423 MBPD, 27%**

**Total Hydrocracking: 0 MBPD, 0%**

**Total Upgrading: 579 MBPD, 37%**

**Crude Runs: 797 MBPD**

**Utilization: 61%**

**Yields: Gasoline 35%, Diesel 24%**

**# of Employees/MMBBL: 28,000**



## U.S. Gulf Coast



**# of Refineries: 43\***

**Total Capacity: 9340 MBPD**

**Average Size: 216 MBPD**

**Total Coking: 1629 MBPD, 17%**

**Total Cracking: 3095 MBPD, 33%**

**Total Hydrocracking: 1377 MBPD, 15%**

**Total Upgrading: 6101 MBPD, 65%**

**Crude Runs: 8635 MBPD**

**Utilization: 91%**

**Yields: Gasoline 42%, Diesel 32%**

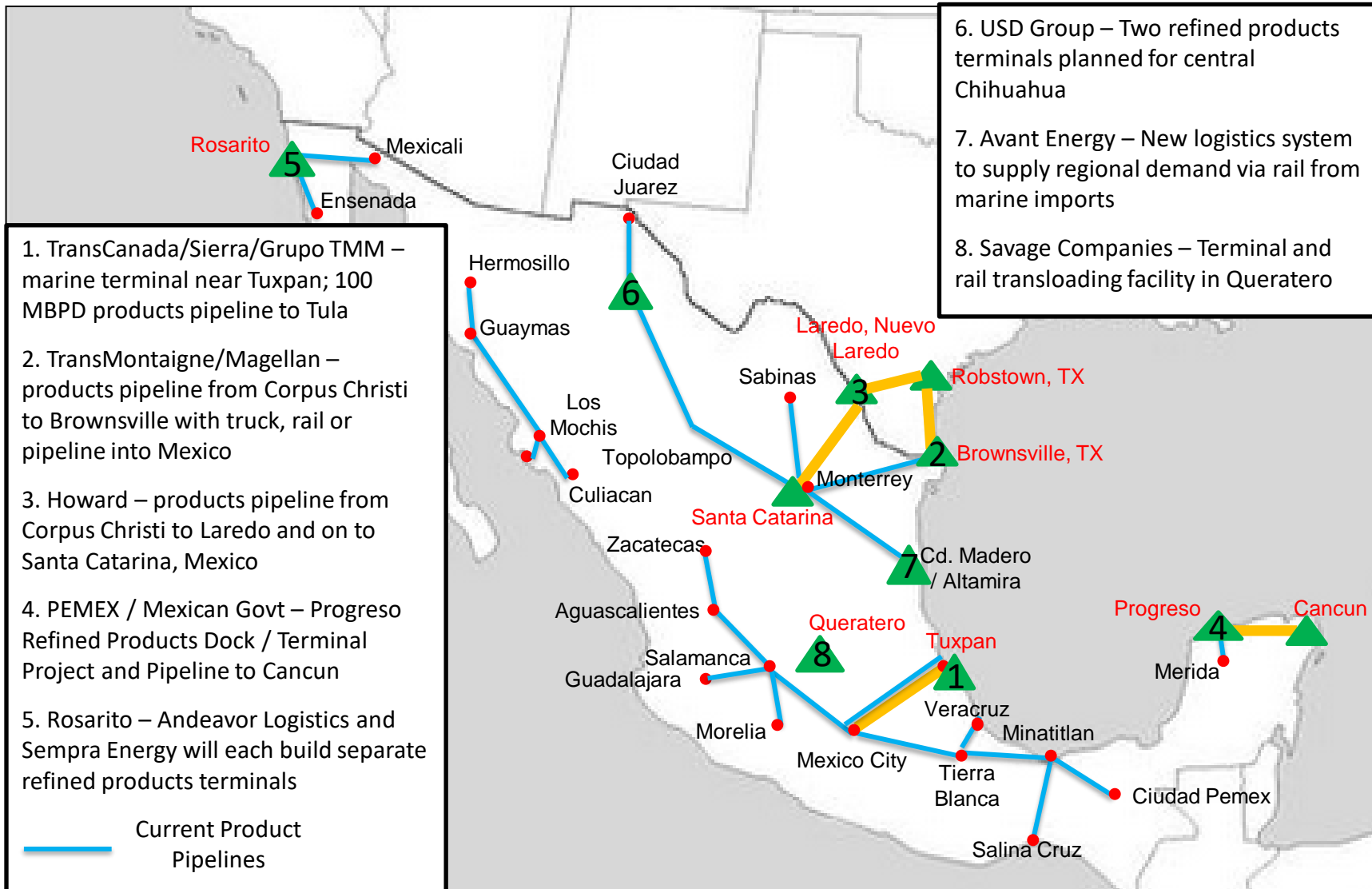
**# of Employees/MMBBL: 3000-7000**

Source: EIA, PEMEX

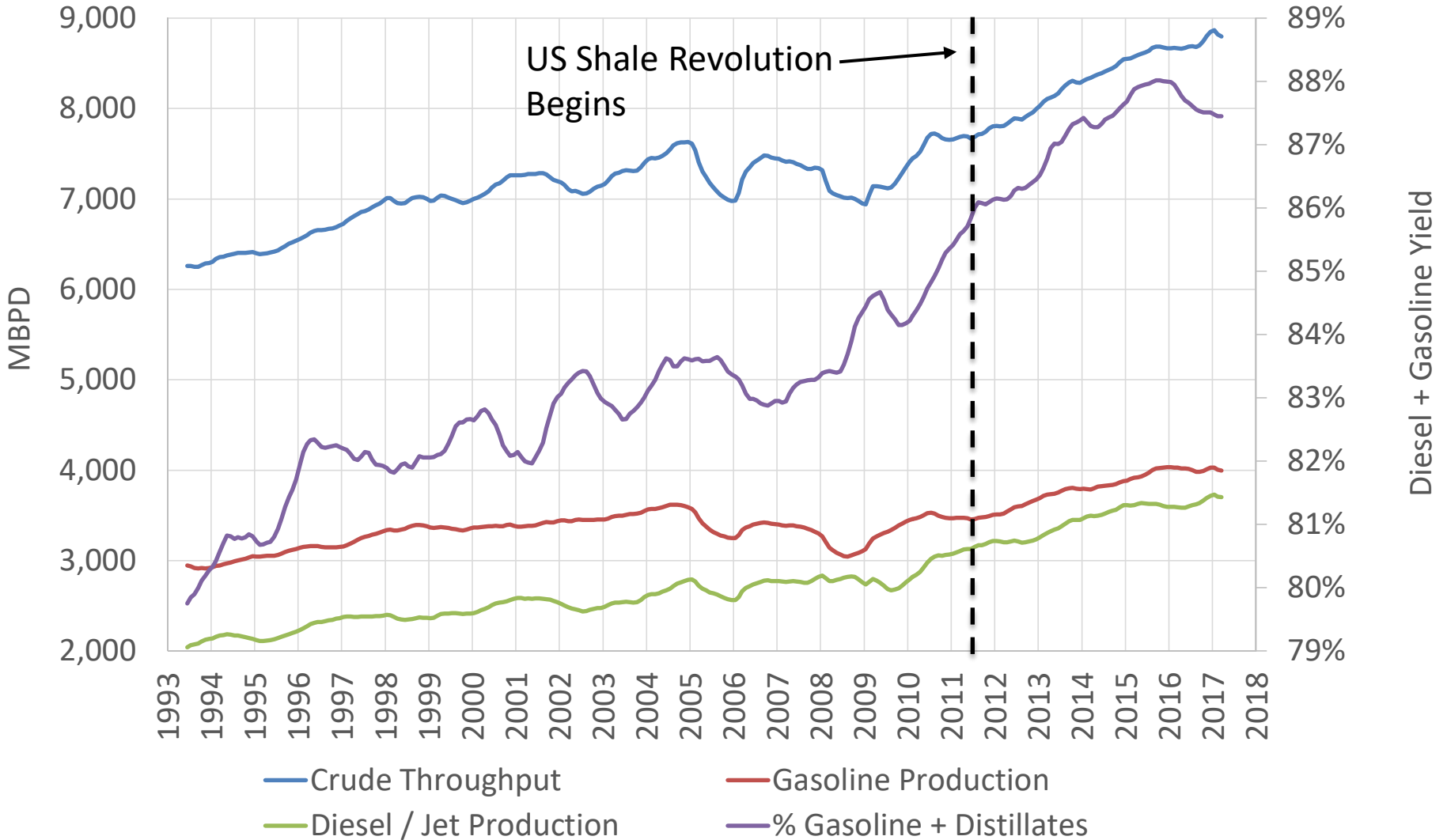
\*Refineries >35 MBPD



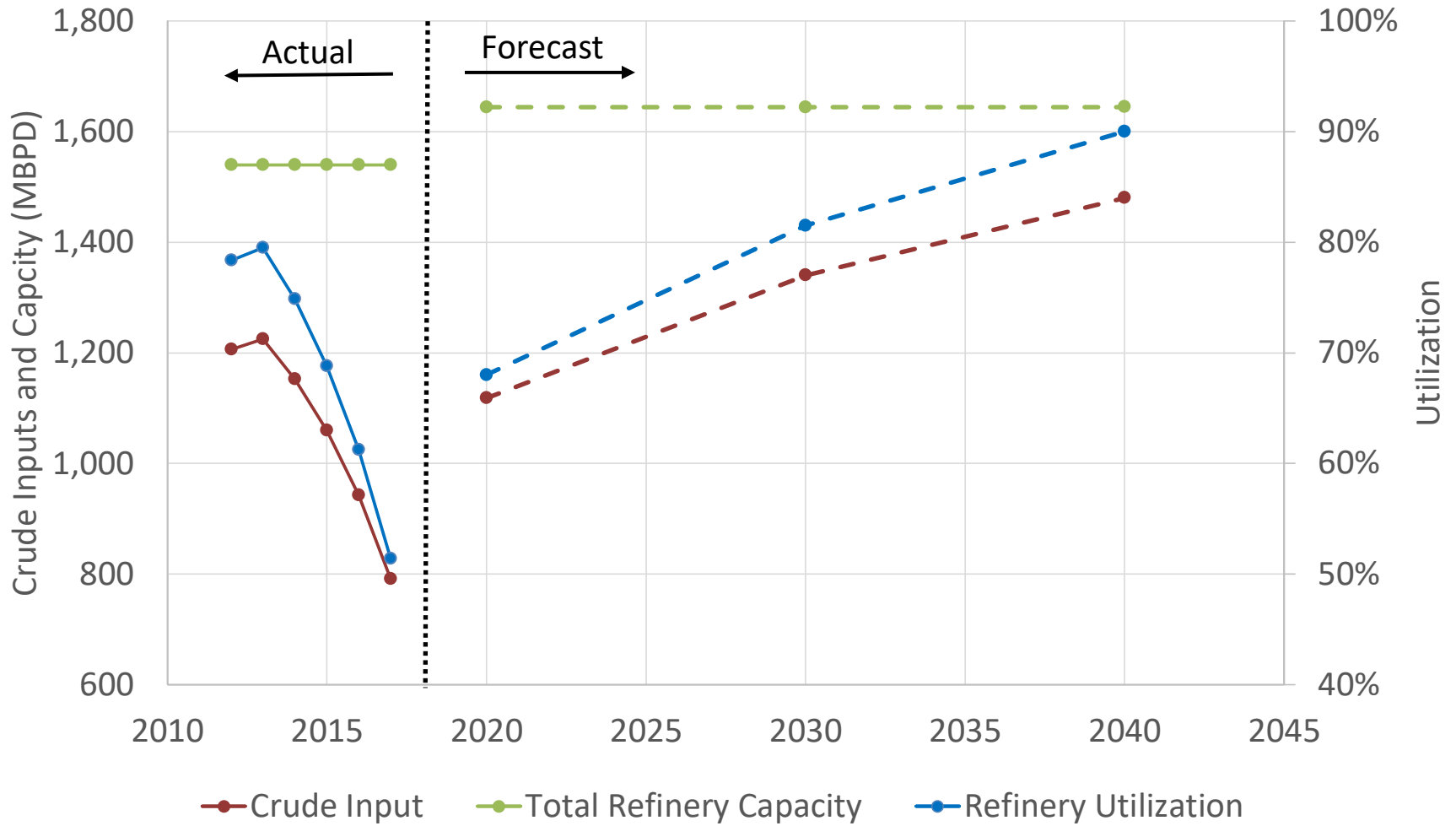
# Reform Focused on Import Infrastructure



# USGC Refinery Throughput and Yields



# IEA Mexican Refining Forecast



Forecast from IEA "Mexico Energy Outlook" Issued in October 2016



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