









# ENERGY SECTOR INVESTMENT OPPORTUNITIES IN TAMAUlipAS



DUTCH ENERGY ASSOCIATION, EMBASSY OF THE NETHERLANDS IN MEXICO,  
BRANDMARION, IRO AND NAVINGO – NETWORKING BREAKFAST  
THE IMPACT OF MEXICO'S PRODUCTION PUSH ON BUSINESS OPPORTUNITIES  
HOUSTON, TX  
MAY 7TH, 2019

# INFRASTRUCTURE



-  HIGHWAYS **14,014 km**
-  RAILWAYS **937 km**
-  INTERNACIONAL AIRPORTS **5**
-  SEA PORTS **2**
-  SEA PORT **1**  
(UNDER CONSTRUCTION)
-  INTERNATIONAL CROSSING **18**

# ROAD CONNECTIVITY



**ECONOMIC CORRIDOR OF THE NORTH OF MEXICO**



**TAMAULIPAS**  
▶ **14,000 km** ROAD SYSTEM

ROAD CONNECTIVITY THAT LINKS GEOGRAPHICAL AND ECONOMIC REGIONS

## TRUNK AXLES

- MAZATLAN-MATAMOROS
- MANZANILLO-TAMPICO WITH BRANCH TO L. CARDENAS
- MEXICO CITY-NUEVO LAREDO
- VERACRUZ-MONTERREY WITH BRANCH TO MATAMOROS

# RAILWAY TRANSPORT IN TAMAULIPAS



RAILWAYS **937 km**

RAILWAY INTERNATIONAL CROSSINGS **2**

## TRANSPORT OF FREIGHT VIA RAILWAY

### IMPORT

BORDER	Volume (Million tonnes)	Involvement (Total)
Nuevo Laredo	19.6	46.4%
Matamoros	2.8	6.7%
<b>National Total</b>	<b>42.2</b>	<b>100%</b>

PORT	Volume (Million tonnes)	Involvement (Total)
Altamira	3.3	17.1%
Tampico	0.2	1.1%
<b>National Total</b>	<b>19</b>	<b>100%</b>

### EXPORT

BORDER	Volume (Million tonnes)	Involvement (Total)
Nuevo Laredo	5.9	40.8%
Matamoros	0.7	4.7%
<b>National Total</b>	<b>14.4</b>	<b>100%</b>

PORT	Volume (Million tonnes)	Involvement (Total)
Altamira	0.4	8.4%
Tampico	0.0	0.2%
<b>National Total</b>	<b>4.2</b>	<b>100%</b>

**KCSM**  
**FERROMEX**

## RELEVANT PRODUCTS TRANSPORTED BY RAIL







# AIR CONNECTIVITY



## TAMAULIPAS 5 INTERNATIONAL AIRPORTS

19 FLIGHTS

1.4 MILLIONS OF PASSENGERS, 2017

- UNITED
- AEROMAR
- AEROMEXICO connect
- interjet
- viva aerobus
- TAR Aerolíneas



# PORT OF MATAMOROS



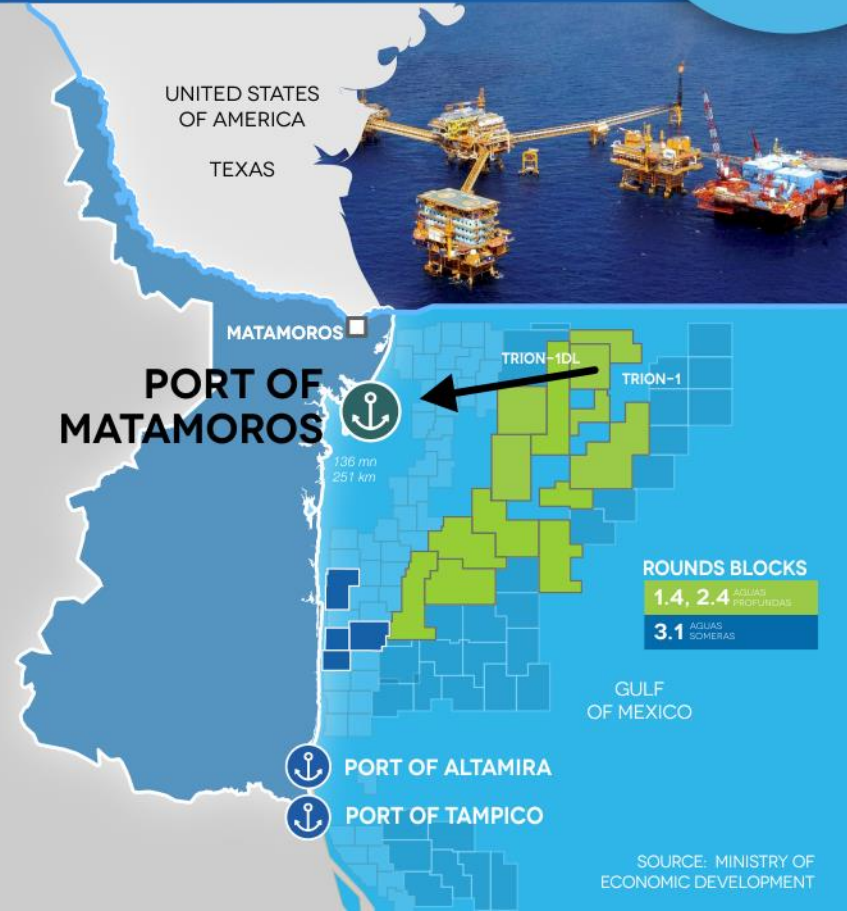
**340 HECTARES**  
**POTENTIAL DEVELOPMENT AREA**

- EXPANSION OF BREAKWATERS (100%)
- DREDGING OF ACCESS CHANNELS (30%)
- DREDGING OF WATER FRONTAGE
- ACCESS ROAD TO THE PORT (100%)
- PIER REHABILITATION (100%)
- URBAN DEVELOPMENT
- ELECTRICITY

**CONSTRUCTION OF MARINE TERMINAL  
FOR LOGISTIC SERVICES**

**PORT  
VOCATION**

- OIL INDUSTRY
- MANUFACTURING
- FISHING
- FREIGHT



SOURCE: MINISTRY OF ECONOMIC DEVELOPMENT



# 5,098 HECTARES POTENTIAL DEVELOPMENT AREA

# PORT OF ALTAMIRA



**3,075**  
HECTARES OF  
PORT AREA

**5,098**  
HECTARES OF  
INDUSTRIAL  
DEVELOPMENT ZONE

**1,422**  
HECTARES OF  
ECOLOGICAL AREA

## 21 ASSIGNEES

- MANUFACTURE AND REPAIR OF OFFSHORE STRUCTURES, OIL PLATFORMS
- TRANSPORT OF MINERALS, PETROCHEMICALS AND AGRICULTURAL PRODUCTS
- FUEL STORAGE TERMINAL
- IMPORT OF WIND INDUSTRY COMPONENTS

## 52 SERVICE PROVIDERS

- PROVISIONING, TUGS, CONTAINER MAINTENANCE, WATER SUPPLY, FUEL AND LUBRICANTS
- LOADING INSPECTION, TRASH COLLECTION, DANGEROUS WASTE

## PORT VOCATION

- COMMERCIAL
- INDUSTRIAL

MARITIME TERMINALS
INDUSTRIAL PARK
LOGISTIC SERVICES COMPANIES
STRATEGIC FISCAL CAMPUS



SOURCE: MASTER PROGRAM OF PORT DEVELOPMENT

# PORT OF TAMPICO

**38 HECTARES**  
**POTENTIAL DEVELOPMENT**  
**AREA IN THE PORT**

## 50 ASSIGNEES

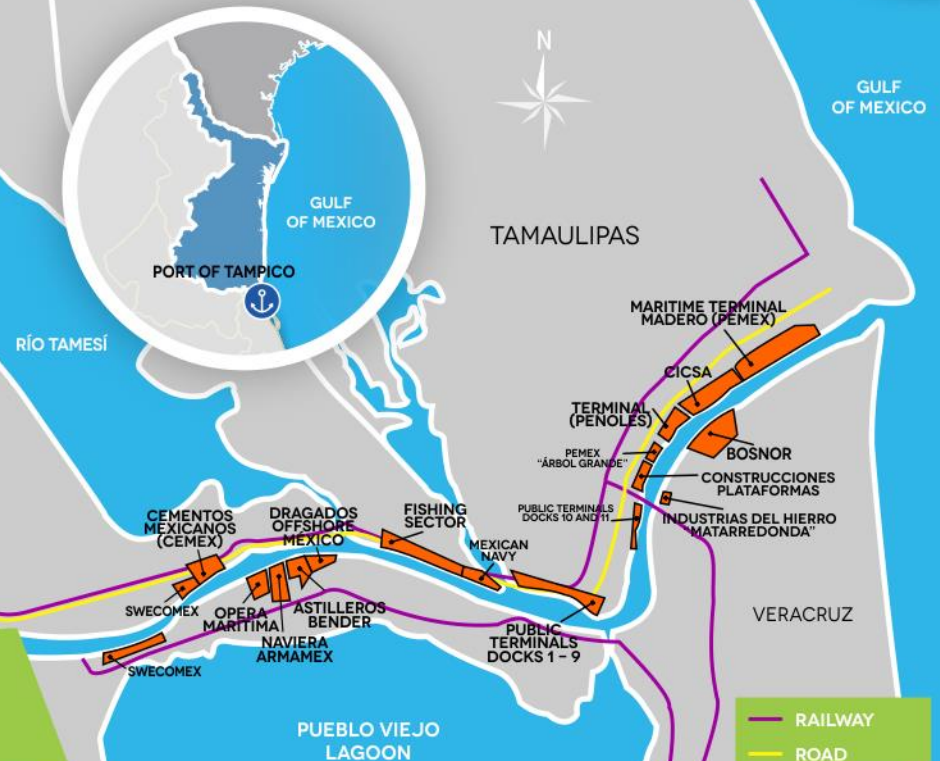
- MANUFACTURE AND REPAIR OF OFFSHORE STRUCTURES, OIL PLATFORMS, FISHING VESSELS
- TRANSPORT OF FERTILIZERS, GRAINS AND MINERALS

## 37 SERVICE PROVIDERS

- PROVISIONING, TUGS, WATER SUPPLY, FUEL AND LUBRICANTS

## PORT VOCATION

- OIL INDUSTRY
- FREIGHT
- NAUTICAL TOURISM



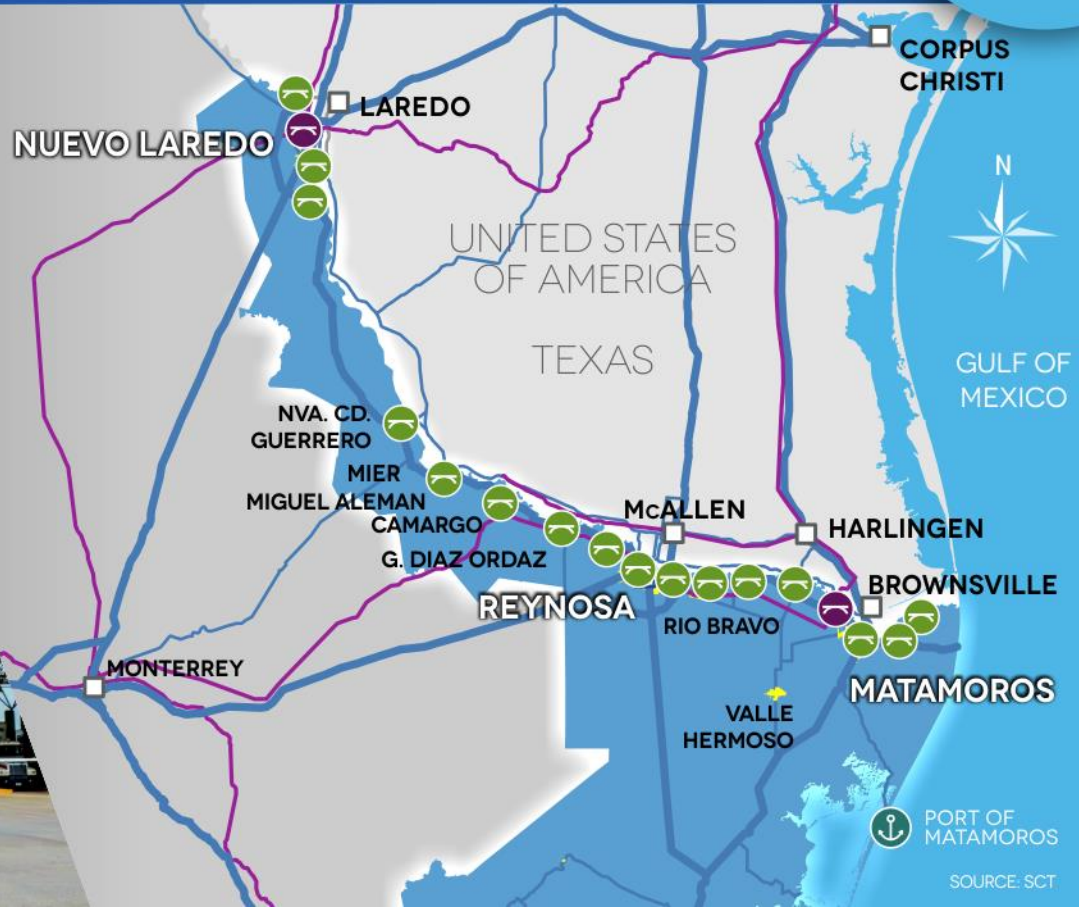


# INTERNATIONAL BORDER CROSSING CONNECTIVITY WITH NAFTA

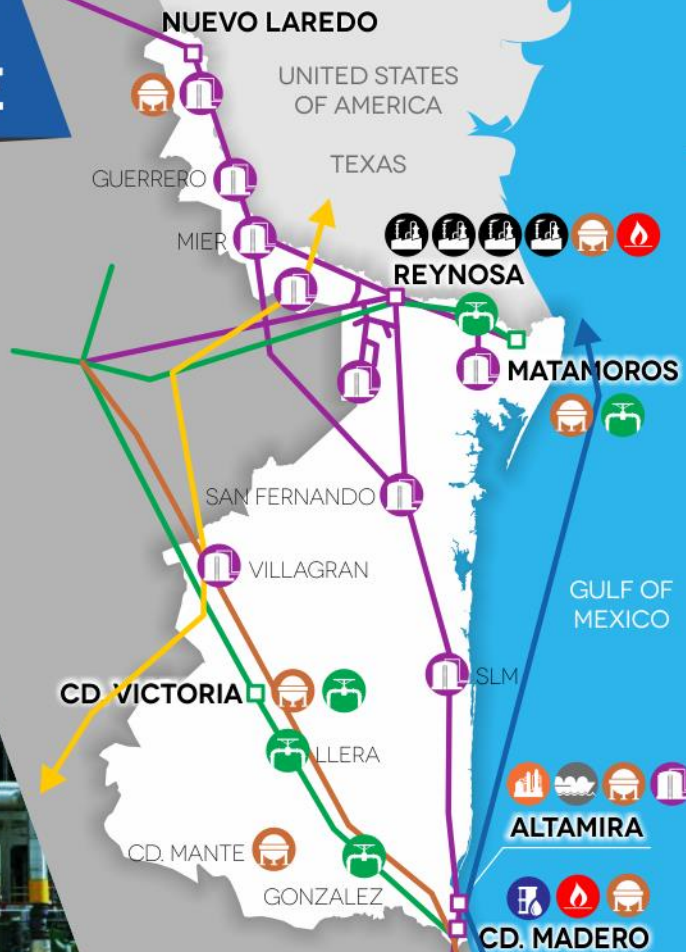
## ▶ 18 INTERNATIONAL BORDER-CROSSINGS














 16 VEHICULAR

 2 RAILWAY



# ENERGY INFRASTRUCTURE



-  **REFINERY**
-  **PETROCHEMICAL COMPLEX**
-  **NAVY TERMINAL**
-  **325 KM FUEL PIPELINES**
-  **5 PUMP STATIONS**
-  **366 KM PIPELINES (OIL)**
-  **5 STORAGE TERMINALS**
-  **1,363 KM GAS PIPELINES**
-  **10 GAS COMPRESSION STATIONS**
-  **4 CRYOGENIC PLANTS**
-  **2 GAS PROCESSING PLANTS**
-  **LOS RAMONES GAS PIPELINE**
-  **TEXAS-TUXPAN MARINE PIPELINE (IN PROCESS)**



# AREAS TO TENDER IN TAMAUlipAS

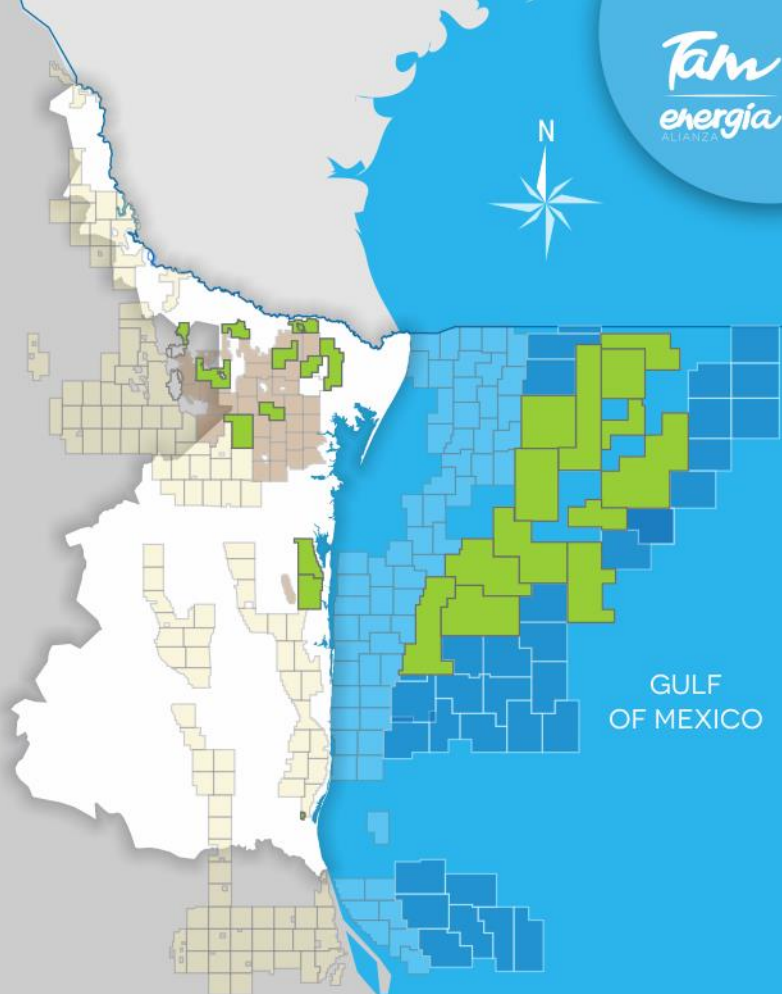
## EXPLORATION AND PRODUCTION OF HYDROCARBONS

Type	Basin	Reserves Estimation (MMboe)	Area (km <sup>2</sup> )	Number of areas
DEEP WATER	PERDIDO	1,662	36,861	37
SHALLOW WATERS	BURGOS	1,290	21,075	53
NON CONVENTIONAL LAND	SABINAS-BURGOS	7,560	19,272	66
CONVENTIONAL LAND	SABINAS-BURGOS	400	10,166	40
		<b>10,912</b>	<b>87,374</b>	<b>196</b>

Mmboe\* Million barrels of oil equivalent

▶ FROM 509 AREAS FOR EXPLORATION AND PRODUCTION IN MEXICO, **TAMAUlipAS HAS 196** (38% FROM TOTAL)

**TENDERED AND AWARDED ROUNDS**  
**1.3, 1.4, 2.2, 2.3, 2.4, 3.1**



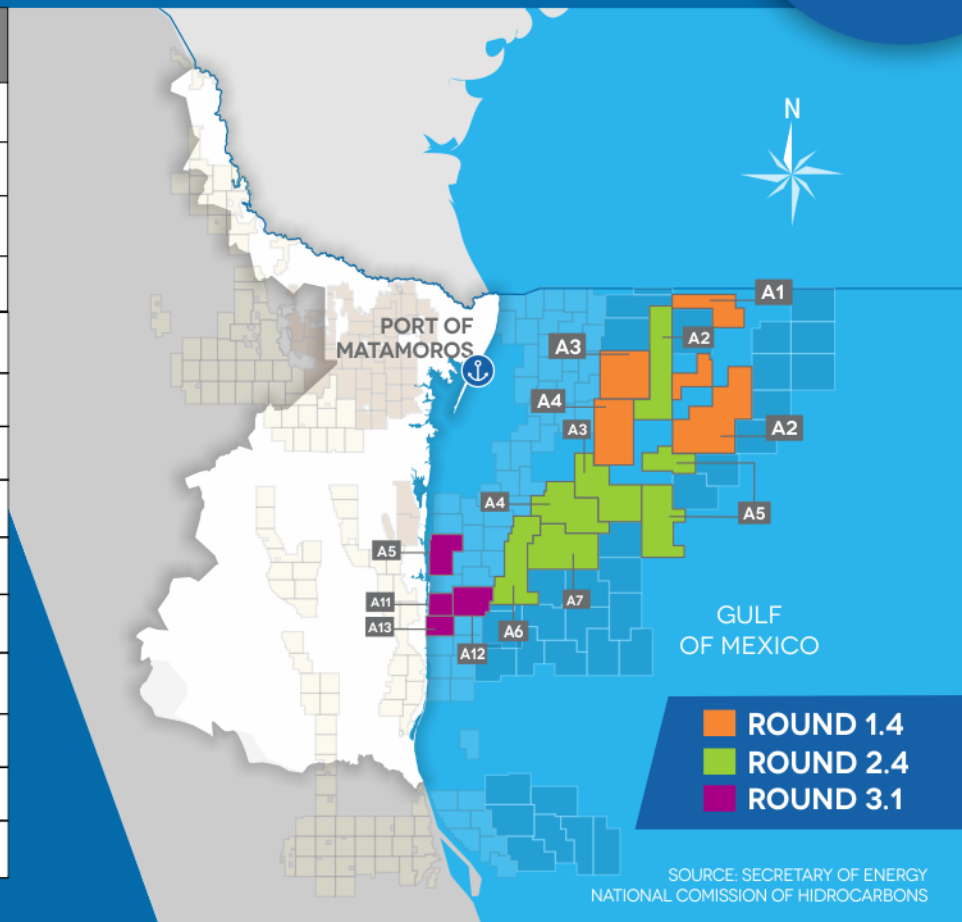




# AWARDED ROUNDS IN TAMAUlipAS

DEEP AND SHALLOW WATER

WINNING BIDDER	AREA	AREA IN km <sup>2</sup>	COUNTRY OF ORIGIN
中国海油 China Offshore Oil Corporation E&P Mexico	1	1,678	China
	2	2,977	France/USA
	3	1,687	USA/Mexico/Japan
中国海油 China Offshore Oil Corporation E&P Mexico	4	1,877	China
	2	2,146	Netherlands / Mexico
	3	2,062	Netherlands / Qatar
	4	1,900	Netherlands / Qatar
	5	2,733	Mexico
	6	1,891	Netherlands / Qatar
	7	1,968	Netherlands / Qatar
	5	813.8	Spain
	11	391.4	UK
	12	811.3	Spain
	13	391.9	UK

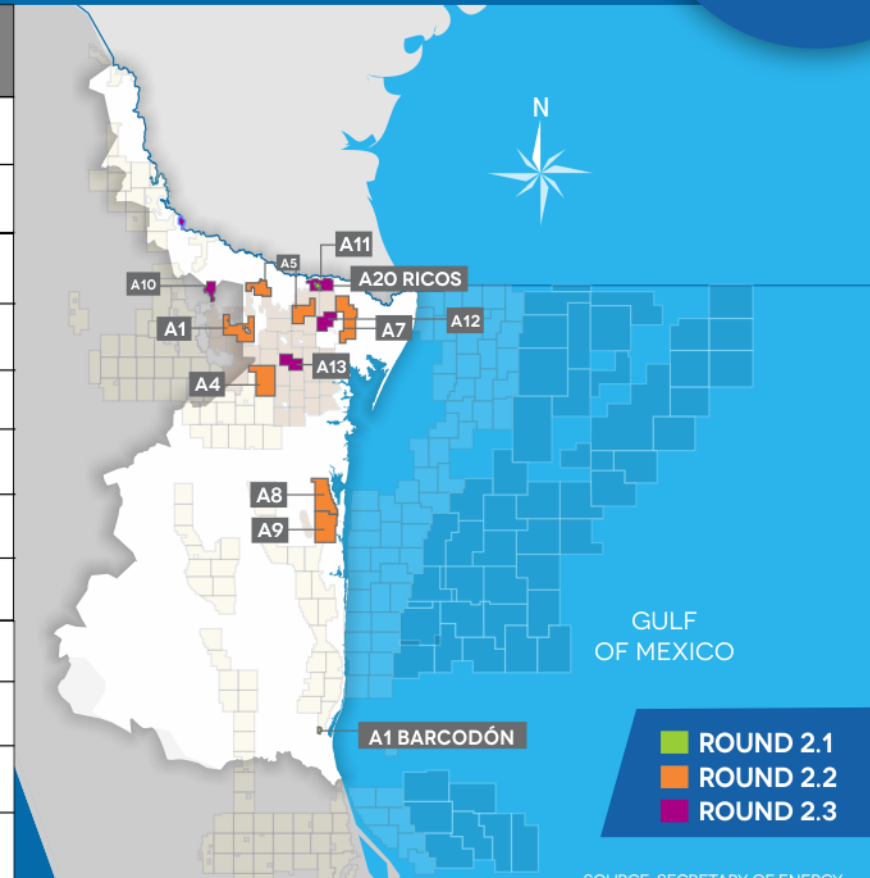




# AWARDED ROUNDS IN TAMAUlipAS

LAND

WINNING BIDDER	AREA	AREA IN km <sup>2</sup>	COUNTRY OF ORIGIN
DIAVAZ	1 BARCODÓN	11	Mexico
Strata	20 RICOS	24	Mexico
IHSa <small>liberoamericana de Hidrocarburos</small> PJP4	1	360	Mexico / Mexico
Sun God RESOURCES  JAGUAR	4	440	Canada / Mexico
Sun God RESOURCES  JAGUAR	5	445	Canada / Mexico
Sun God RESOURCES  JAGUAR	7	445	Canada / Mexico
Sun God RESOURCES  JAGUAR	8	416	Canada / Mexico
Sun God RESOURCES  JAGUAR	9	464	Canada / Mexico
IHSa <small>liberoamericana de Hidrocarburos</small> PJP4	10	99	Mexico / Mexico
Newpek  VERDAD <small>OIL &amp; GAS CORPORATION</small>	11	163	Mexico / USA
Newpek  VERDAD <small>OIL &amp; GAS CORPORATION</small>	12	200	Mexico / USA
IHSa <small>liberoamericana de Hidrocarburos</small> PJP4	13	199	Mexico / USA



# PROJECT: CLEAN ENERGY GENERATION

**OBJETIVE:** TO MAKE TAMAULIPAS IN A PIONEER STATE ON CLEAN ENERGY GENERATION PROMOTING THE ENERGY SUSTAINABILITY.



## PHASE 1

2.5  
MW

### QUALIFIED SUMMINISTER

- ▶ Power generation capacity: 2.5 MW
- ▶ Tam Energía Alianza as technical manager
- ▶ Academic Benefits
- ▶ Wholesale Electrical Market (MEM) participation

## PHASE 2

5  
MW

### SOLAR FARM

- ▶ Power generation capacity: 5 MW
- ▶ Affiliate with a developer and the State Government

## PHASE 3

150  
MW

### WIND FARM

- ▶ 50 wind turbines with capacity of: 150 MW
- ▶ Plant factor  $\geq 40\%$
- ▶ Commercialization with Tamaulipas industrial parks



# PROJECT: TAMAULIPAS ENERGY CENTRE

Tam  
energía  
ALIANZA

PEMEX - C.A.S.E.S. REYNOSA  
CENTRO DE ADIESTRAMIENTO EN SEGURIDAD, ECOLOGÍA Y SOBREVIVENCIA

**OBJETIVE:** INCORPORATE THE DIFFERENT CAPABILITIES OF OUR INSTITUTIONS TO ENHANCE ITS PROFESSIONAL EXPERIENCE AND PROVIDE A SUSTAINABLE SELF-SUFFICIENT REGIONAL DEVELOPMENT

- UAT (ENVIROMENT, ATMOSPHERIC, OCEANOGRAPHIC AND EDUCATION)
- IMP (OIL&GAS, MARKETING)
- CEE (ELECTRICAL STUDIES CENTRE)
- UPV (CERTIFICATION)

## ACTIVITIES

- EDUCATION AND CERTIFICATION
- RESEARCH
- PUBLICATION
- DIFFUSION AND CONNECTIONS
- INSTITUTIONAL RELATIONS

## TARGETS

- IMPROVE THE CAPABILITIES OF ALL THE STATE-LEVEL ENERGY INSTITUTIONS
- TRANSFORM THE ENERGY CENTER IN A NATIONAL AND INTERNATIONAL EPICENTER OF ENERGY STUDIES
- IMPROVE THE ACADEMIC PROGRAMS QUALITY AND STRENGTHEN OUR PARTNERSHIPS WITH OUR EDUCATIONAL CENTERS AND THE ENERGY INDUSTRY
- GUIDE AND SUPPORT THE RESEARCH ON THE ENERGY SECTOR

## ACADEMIC OFFERINGS

- ▶ PHD, MASTER AND BH IN SCIENCES OR ENGINEERING
- ▶ MASTER AND BH IN DIRECTION AND MANAGEMENT STRATEGIC PROJECTS

# WIND PROJECTS



## OPERATION (7) 301 MW

El Cortijo - Reynosa	183 Mw
Salitrillos - Reynosa	103 Mw
El Porvenir - Reynosa	54 Mw
Victoria - Güémez	50 Mw
La Mesa-Güémez	50 Mw
Tres Mesas I - Llera	62 Mw
Tres Mesas II - Llera	85 Mw

## PROJECT (21) 2,351.2 MW

- 9 Reynosa
- 3 Matamoros
- 3 Llera
- 2 Méndez
- 1 Nuevo Laredo
- 1 San Fernando
- 1 Crullas
- 1 Güémez

# INVEST IN TAM PLATFORM



[www.investintamaulipas.com](http://www.investintamaulipas.com)

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energia  
ALIANZA

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IN  
Tam  
TAMAUlipas

**PLATFORM THAT SEEKS  
TO ATTRACT AND BOOST  
INVESTMENT BY PRESENTING  
THE COMPETITIVE ADVANTAGES  
THAT TAMAUlipas HAS  
TO OFFER.**

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CONTENTS:

- WHY INVEST?
- INDUSTRIAL PARKS
- NEWS
- TESTIMONIALS
- PRESENTATIONS
- VIDEOS





**TAM ENERGÍA ALIANZA**  
EDIFICIO EMPRESARIAL, TECNOTAM  
(PARQUE CIENTÍFICO Y TECNOLÓGICO)  
CARRETERA VICTORIA-SOTO LA MARINA  
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