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December 2013 Spending Indices

Through December, Industrial Info tracked approximately \$223.4 billion of industrial capital and maintenance projects that started in 2013 in North America.

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Texas, Louisiana Gear Up for More Than \$116 Billion in 2014 Industrial Project Starts

More than \$116 billion in industrial capital and maintenance projects are on the books to kick off in Texas and Louisiana in 2014, according to Industrial Info Resources' [North American Project Database](#).

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December 2013 Spending Indices

North American Project Spending Index

Through December, Industrial Info tracked approximately \$223.4 billion of industrial capital and maintenance projects that started in 2013 in North America. The increasing production of oil and natural gas from unconventional drilling certainly made its mark on the year's project activity. The value of project starts for the Oil & Gas Transmission Industry, for example, was up more than 27% to \$17.25 billion.



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Inexpensive natural gas feedstock has also increased activity in the Chemical Processing Industry. The value of 2013 North American project starts in this industrial sector increased more than 71% to \$17.57 billion. Much of the value of these project starts came from activity such as ethylene unit additions and the construction of fertilizer manufacturing plants, which use natural gas as a feedstock. As you can see from the graph below, most of the increased Chemical Processing activity occurred in the Southwest market region, particularly in Texas and Louisiana.

December Construction Starts

In December, Industrial Info tracked projects with a combined total investment value of slightly less than \$14 billion that kicked off in the United States and Canada. Some of the largest projects to kick off included Dyno Nobel Incorporated's anhydrous ammonia plant in Westwego, Louisiana, and Phase II construction of TPCO Enterprise Incorporated's steel tube minimill in Gregory, Texas. In addition, approximately \$2.8 billion of wind power projects began construction, as developers rushed to get projects off of the ground in order to qualify for the expiring federal wind Production Tax Credit (PTC), worth \$23 per megawatt-hour.



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Spending Gap Index

At the beginning of each year, Industrial Info takes the value of planned project spending for each industrial sector, and throughout the year compares this to current planned spending for the month, providing the rate of "project fallout."

Out of \$480.9 billion of projects that were on the books at the start of the year to kick off in 2013, about \$223 billion actually began, representing project fallout of approximately 53.5%. Industrial Info has seen a gradual increase in the value of annual project fallout over the past few years. Project fallout in 2011 was about 48.6%, rising to 50.1% in 2012 and above 53% for 2013.

Please enter any questions or suggestions below.

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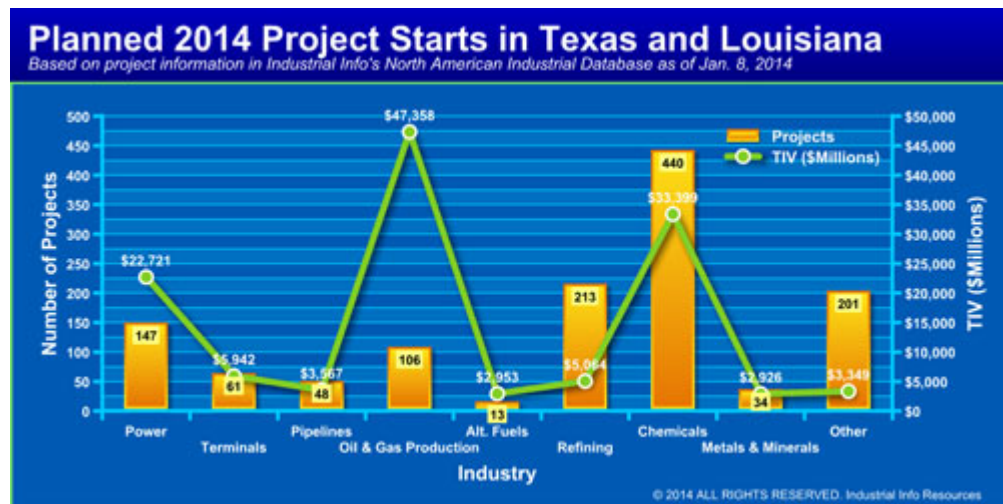


Texas, Louisiana Gear Up for More Than \$116 Billion in 2014 Industrial Project Starts

More than \$116 billion in industrial capital and maintenance projects are on the books to kick off in Texas and Louisiana in 2014, according to Industrial Info Resources' [North American Project Database](#).

Texas accounts for about \$70.9 billion of these planned projects, while Louisiana has about \$45.7 billion in projects that are currently planned to break ground this year. Although many of these projects will be pushed out to future dates or canceled altogether, the two states are starting the year with a very high value of planned industrial construction starts.

As in 2013, the highest-value industries in regard to planned projects for the two states are [Oil & Gas Production](#) and [Chemical Processing](#), which account for \$47.35 billion and \$31.64 billion in planned project value, respectively.



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Not surprisingly, much of the value of the Oil & Gas Production projects comes from planned liquefied natural gas (LNG) production and export facilities, which require approval from the Federal Energy Regulatory Commission (FERC) to construct and operate the facilities, and the Department of Energy to export the LNG to countries without a free trade agreement with the United States.

[LNG export facilities](#) that could begin construction this year include Gulf Coast LNG Export LLC's \$12 billion facility in the Port of Brownsville in Texas, and [Sempra Energy \(NYSE:SRE\)](#) subsidiary Cameron LNG LLC's \$10 billion plant on the Louisiana Gulf Coast.

Also within the Oil & Gas Production Industry, [Sasol North America Incorporated's \(NYSE:SSL\)](#) gas-to-liquids (GTL) project in Westlake, Louisiana, could potentially move forward this year. The facility would process natural gas from the Haynesville shale into approximately 48,000 barrels per day (BBL/d) of clean diesel, jet fuel and other liquid fuels. However, the cancellation in early December of a similar project planned by [Royal Dutch Shell \(NYSE:RDS.A\)](#) in Louisiana casts some doubt on the viability of the project. Shell cited economic reasons for canceling its planned GTL facility.

Inexpensive natural gas is also driving activity in the Chemical Processing Industry in the two states, notably in projects involving the production of ethylene and methanol. [Dow Chemical Company \(NYSE:DOW\)](#) kicked off civil construction for additions of [ethylene](#) and propane dehydrogenation units at its Oyster Creek Chemical facility in Freeport, Texas in 2013. In 2014, heavy hitters such as Chevron Phillips Chemical Company and ExxonMobil Chemical Company have plans to add ethylene units at their facilities in Baytown, Texas. Both projects

have estimated total investment values of approximately \$2.5 billion, in addition to the construction of supporting equipment and facilities. Sasol is also planning an ethylene unit addition at its site in Westlake, which will probably move forward even if the company's above-mentioned GTL project is stalled.

While blockbuster projects such of these take prominence in discussions of industrial project activity, hundreds of smaller projects are planned throughout the region, including more than 250 planned Chemical Industry maintenance turnarounds, contributing more than \$1 billion in planned industrial spending for the year.

Industrial Info will be discussing these projects and other spending trends at our upcoming [2014 Market Outlook & Networking Event](#), which will be held January 29 at the Hilton Americas in Houston. Industrial Info's team of industry experts will be discussing spending activity and market trends in the U.S. and Canada, with special emphasis on the Southwest and U.S. Gulf Coast regions. Attending the event is free and will be followed by a networking session with drinks and hors d'oeuvres that will give you a chance to ask questions of our presenters and mingle with your peers.

In addition to the Chemicals and Oil & Gas industries, other highlighted industries will include [Petroleum Refining](#), [Power Generation](#), and [Metals & Minerals](#), as well as a top-line spending forecast for North America. Space is limited, so make sure to [RSVP today!](#)

View Project Report - [300104455](#) [300073863](#) [300044915](#) [300081897](#) [300133515](#) [300032325](#) [300053592](#) [300034246](#) [300041341](#) [300053592](#)

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Upcoming Tradeshows & Events



[Market Outlook & Networking Event - Houston, TX - January 29](#)

On January 29, we will be holding our popular Market Outlook & Networking Event at

the Hilton Americas in downtown Houston. The presentations will focus on project spending activity and market trends in the U.S. and Canada, with special emphasis on the Southwest & Gulf Coast regions. Make sure to RSVP today!

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[2014 North American Power Industry Outlook](#)

The newly released North American Power Industry Outlook provides an in-depth analysis of the market trends and statistics driving major project spending opportunities in the power market. Authored by Industrial Info's industry experts, this comprehensive online tool gives you valuable insight into 2014 and beyond. Get detailed spending analysis by market region, fuel type and project type that are derived from actual projects reported by our research professionals. Quarterly updates keep you informed throughout the year on actual performance versus forecasted activity.

[U.S. Combustion Turbine Predictive Maintenance Cost Analyzer](#)

Analyzing 3,000+ Combustion Turbines in the US Power Market with an average annual maintenance spend of \$3 Billion through 2017, the Combustion Turbine Predictive Maintenance Cost Analyzer builds on Industrial Info's extensive turbine database in combination with "GenStack" runtime data to provide a predictive five-year maintenance spend outlook that includes Major Overhauls, Hot Gas Path Inspections, Combustion Inspections and Annual Inspections.

This online, subscription-based product is updated quarterly to take into account actual run hours and starts from previous quarters and makes appropriate adjustments to future spend profiles.

[2014 Global Industrial Outlook](#)

Industrial has updated its Global Industrial Outlook to take us into 2014. This online product provides quarterly updated project spending statistics that are broken down by industry, market region and budget type (capital or maintenance). Detailed assessments from Industrial Info's industry experts help explain how the data and information reflect broader industrial trends.

[U.S. & Canada Project Restart Map Series - 2013 - 4Q Edition](#)

Industrial Info has updated the popular Project Restart Map Series, providing a visual representation and details about more than \$267 billion of U.S. and Canada projects that were previously on-hold or canceled that have subsequently returned to an active status. Maps are available by individual market region or as a complete series.

Project Listings Include:

- Owner Name
- Project Name
- Construction Start Year
- Project Value