

Mariner East Project to Generate Over \$9 billion of Economic Impact in Pennsylvania, Shows New Study by Econsult Solutions, Inc.

EXECUTIVE SUMMARY

The construction of Sunoco Pipeline L.P.'s Mariner East pipelines and supporting infrastructure at the Marcus Hook Industrial Complex in southeast Pennsylvania will profoundly benefit the economy of the region, Econsult Solutions, Inc. (ESI) has found in an updated economic impact analysis of the multi-billion dollar project

The total potential economic impact from all Mariner East construction in the Commonwealth, updated from a 2015 study, is estimated to be \$9.1 billion, supporting approximately 9,500 total jobs each year over six years of construction, with earnings of \$2.7 billion. This is more than double the previous estimated economic impact from construction on the project, being built by Sunoco Pipeline and its parent, Energy Transfer Partners, L.P.

Estimated Economic Impact of the Operations and Construction Spending of the Mariner East Projects, the Fractionation Facility at MHIC, and Associated Upgrades at MHIC, in Pennsylvania

Impact Type	One-Time Impacts from Construction	Annual Operations Economic Impacts
Total Economic Impact	\$9.1 billion	\$140 - \$210 million
Employment Supported	9,500 jobs per year over 6 years of construction	360 – 530 jobs
Employee Compensation	\$2.7 billion	\$30 - \$45 million

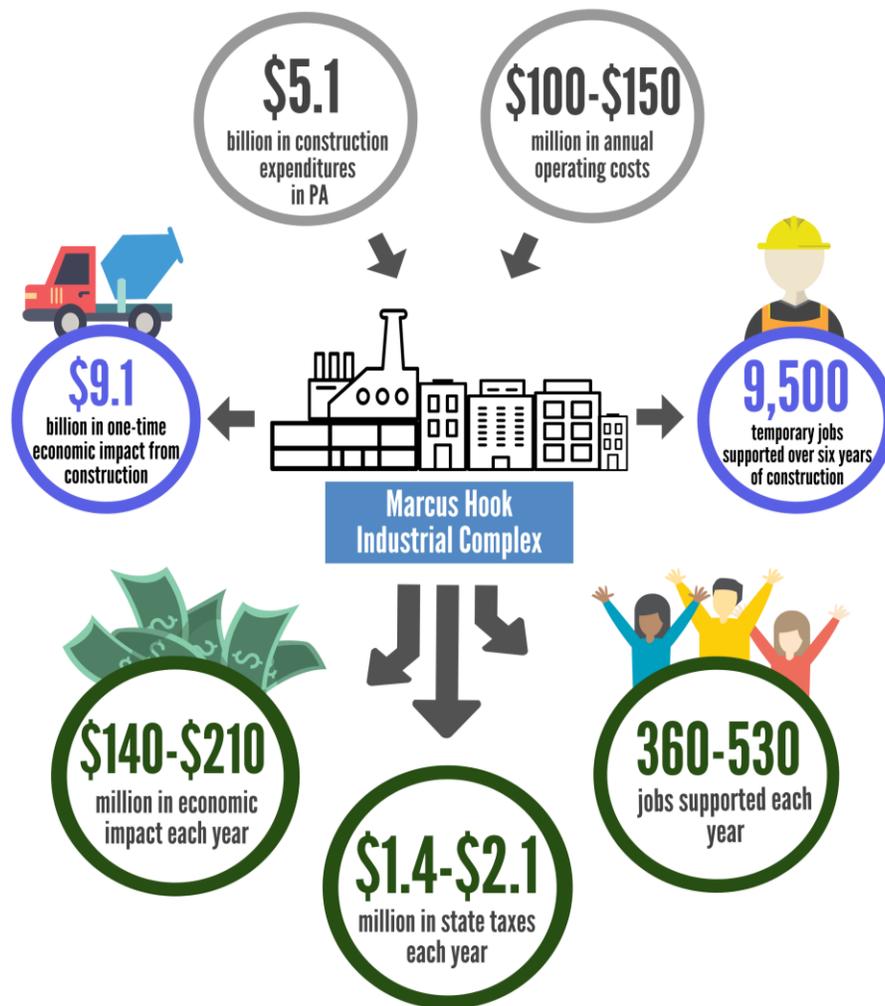
The increase is due to the expansion of Mariner East 2 with a second pipeline and additional facilities at Marcus Hook Industrial Complex (MHIC), including a fractionation facility completed in 2017 for Energy Transfer's related Revolution project.

ETP's operations at MHIC related to natural gas liquids such as propane, butane and ethane will generate annually recurring economic activity through the Commonwealth. Due to the increase in operations at MHIC, the economic impact estimates will be significantly higher than previously estimated in 2015. By 2020, the total annual economic impact in the Commonwealth from the ongoing operations of the Mariner East projects, the fractionation facility and the associated improvements at MHIC will be between \$140 and \$210 million, supporting between 360 and 530 jobs with earnings between \$30 and \$45 million.

Background

In 2015, ESI estimated the economic impact of the Mariner East project in Pennsylvania. Since then, that potential economic impact has substantially increased due to changes to the Mariner East project scope and the introduction of an additional phase by Sunoco Pipeline L.P. and its parent, Energy Transfer Partners L.P. Changes to the project since 2015 include:

- Construction of Mariner East 1, a 300-mile pipeline, is now complete
- The demand during open season for the 350-mile Mariner East 2 project led to a significant expansion in the system from a 16-inch to a 20-inch pipeline.
- The expansion includes an additional 16-inch pipeline, known as Mariner East 2X.
- To support the completed and under-construction pipelines, extensive processing, storage and distribution facilities have been and will continue to be built at MHIC, Energy Transfer’s nearly 800-acre terminal complex in Marcus Hook, Pa.
- As part of the Revolution Project, a new project announced by Energy Transfer Partners (ETP) in 2015, a fractionation facility has been built at MHIC to separate various natural gas liquids for market.



Access the full report: <http://www.econsultsolutions.com/report/potential-economic-impacts-of-mariner-east-pipelines>

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