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Office of Regulation, Analysis, and Engagement
U.S. Department of Energy
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**Re: Mexico Pacific Limited LLC
FE Docket Nos. 18-70-LNG and 22-167-LNG
October 2026 Semi-Annual Report**

October 1, 2026

Ladies and gentlemen:

Pursuant to Ordering Paragraph J of DOE FE Order No. 4248,¹ Ordering Paragraph N of DOE/FE Order No. 4312,² and Ordering Paragraph J of DOE FECM Order No. 4995,³ I submit this semi-annual report on behalf of Mexico Pacific Limited LLC ("MXP") to the Department of Energy's ("DOE") Office of Fossil Energy and Carbon Management ("DOE/FECM"). This report describes the progress MXP has made in developing and commercializing the Saguaro Energía LNG Facility, its proposed LNG production and storage facility to be located in the State of Sonora, Mexico. MXP has made progress since filing its April 2026 Semi-Annual Report, as detailed herein.

The Saguaro Energía LNG Facility is critically important to the United States. It provides a vital outlet for U.S. Permian Basin natural gas producers — including project customers ExxonMobil and ConocoPhillips — enabling them to produce and evacuate over 1,000 Bcf/yr (nearly 3 Bcf/d) of associated natural gas to Asian markets at the lowest landed price of LNG into Asia globally. MXP's strong price advantage reinforces U.S. energy dominance in strategic global markets. The project aligns with President Trump's goal to "unleash US LNG" and offers an alternative westward route to deliver Permian natural gas to U.S. allies and customers worldwide. It also advances energy supply diversification at a time when global geopolitical instability has driven strong demand for reliable, diverse LNG sources.

The project is equally important to Mexico as it will be one of the largest foreign private investments in Mexican history and it will drive economic growth and industrial investment across Sonora and Mexico. The Saguaro Energía LNG Facility is expected to generate thousands of jobs, substantial royalty and tax revenue for Mexico, and establish Mexico as a significant LNG exporter.

MXP continues to work closely with Mexican federal, state, and municipal governments to advance the Saguaro Energía LNG Facility and the associated Mexican pipeline. All key required Mexican permits are in place

¹ Mexico Pacific Limited LLC, DOE/FE Order No. 4248 (Sept. 19, 2018).

² Mexico Pacific Limited LLC, DOE/FE Order No. 4312 (Dec. 14, 2018).

³ Mexico Pacific Limited LLC, DOE/FECM Order No. 4995 (Apr. 28, 2023).

and remain in full force and effect, subject to the resolution of certain *amparo* proceedings brought against several of those permits. An *amparo* is a constitutional challenge under Mexican law in which the federal authorities that issued the permits — rather than MXP — are the responding parties; MXP participates as an interested third party. MXP is working with the responsible Mexican federal authorities toward resolution.

On September 28, 2026, the Federal Energy Regulatory Commission (“FERC”) issued an order in Docket No. CP23-29-002 granting Saguaro Connector Pipeline, L.L.C. (“Saguaro Connector”) a three-year extension of time, until February 15, 2030, to construct and place into service its border facility, which will transport U.S. natural gas across the border for delivery to the Saguaro Energía LNG Facility. In granting the extension, FERC recognized Saguaro Connector’s efforts to advance the project notwithstanding delays from litigation and ongoing negotiations with shippers, including MXP, and noted that Saguaro Connector “intends to develop the Border Facility in coordination with [MXP’s project], and both companies emphasize their commitment to the development of the Border Facility.”⁴

As of October 1, 2026, MXP and its affiliates have executed long-term LNG offtake contracts for the sale of over 12 mtpa of LNG with seven credit-worthy global buyers, including U.S. producers ExxonMobil and ConocoPhillips. These agreements remain valid and in good standing, reflecting strong market demand for LNG from the Saguaro Energía LNG Facility.

MXP also continues to engage with potential equity partners and other financing sources for the MXP project and expects to make further progress in the coming months.

MXP notified DOE/FECM of a change in control (CIC) on March 5, 2025, with supplemental notices filed on March 21, May 30, August 8, and November 24, 2025. The CIC was effectuated by a transaction dated July 9, 2025, and was designed to strengthen the LNG export project.

On June 18, 2025, MXP filed with DOE/FECM an application to extend the first-export deadline under the non-FTA export authorization in FE Docket No. 18-70-LNG. MXP also has a pending application, filed December 28, 2022, for authorization to export an additional 291.22 Bcf/year of LNG to non-FTA nations under DOE/FE Order No. 4312 (Docket No. 22-167-LNG). Both applications remain pending, and MXP looks forward to receiving the orders granting both requests.

If you have any questions regarding this submission, please contact me.

Sincerely,

Signed by:

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Manuela Molina
 Mexico Pacific Limited LLC

⁴ *Saguaro Connector Pipeline, L.L.C.*, 196 FERC ¶ 61,241, at P 9 (2026).