



Natural Gas Supply Association

Let's Talk Numbers: The Good News Story of the Shale Revolution

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WWW.NGSA.ORG



88



90



50



46



21



65



5



5



79



32



7



44



103



4



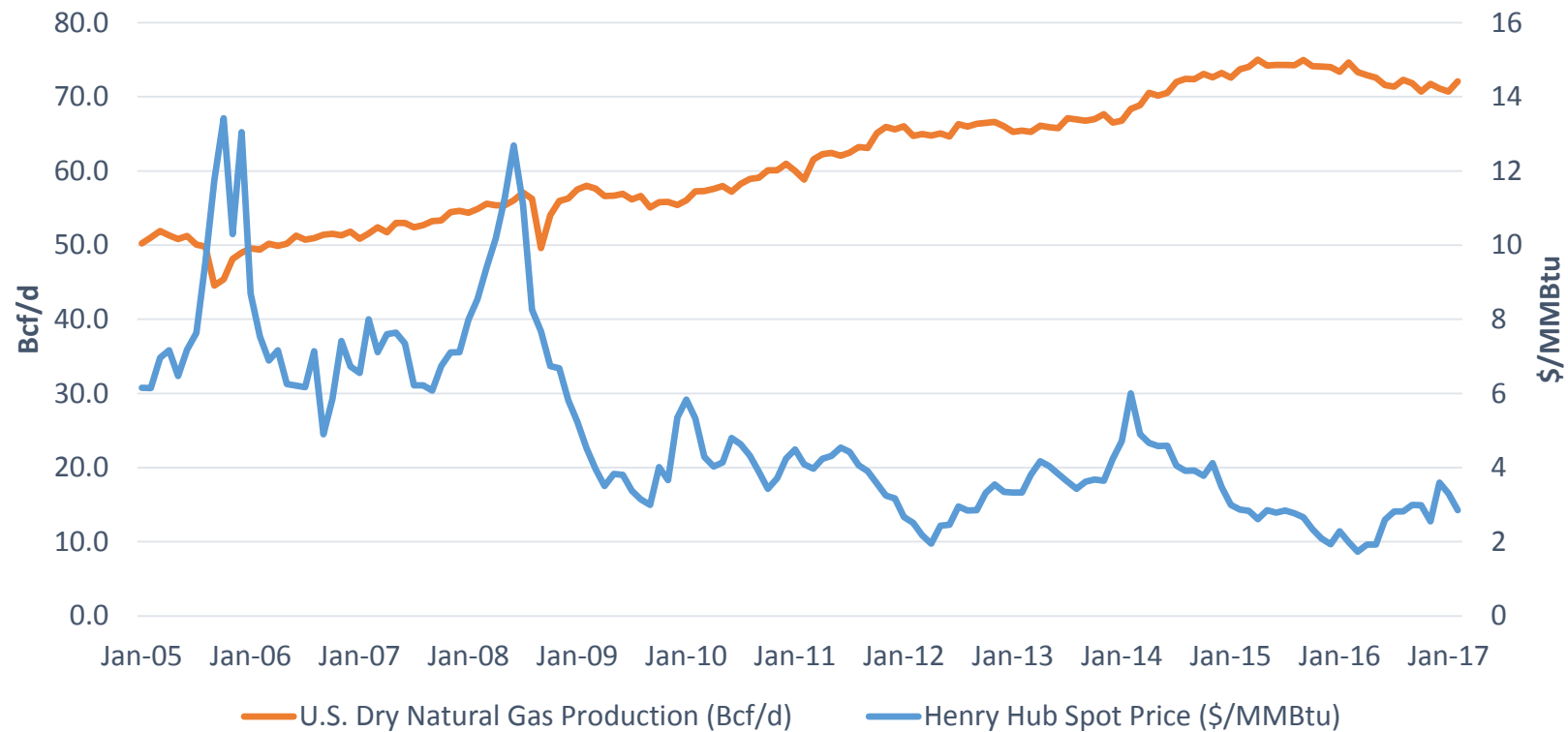
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44 21 103 32
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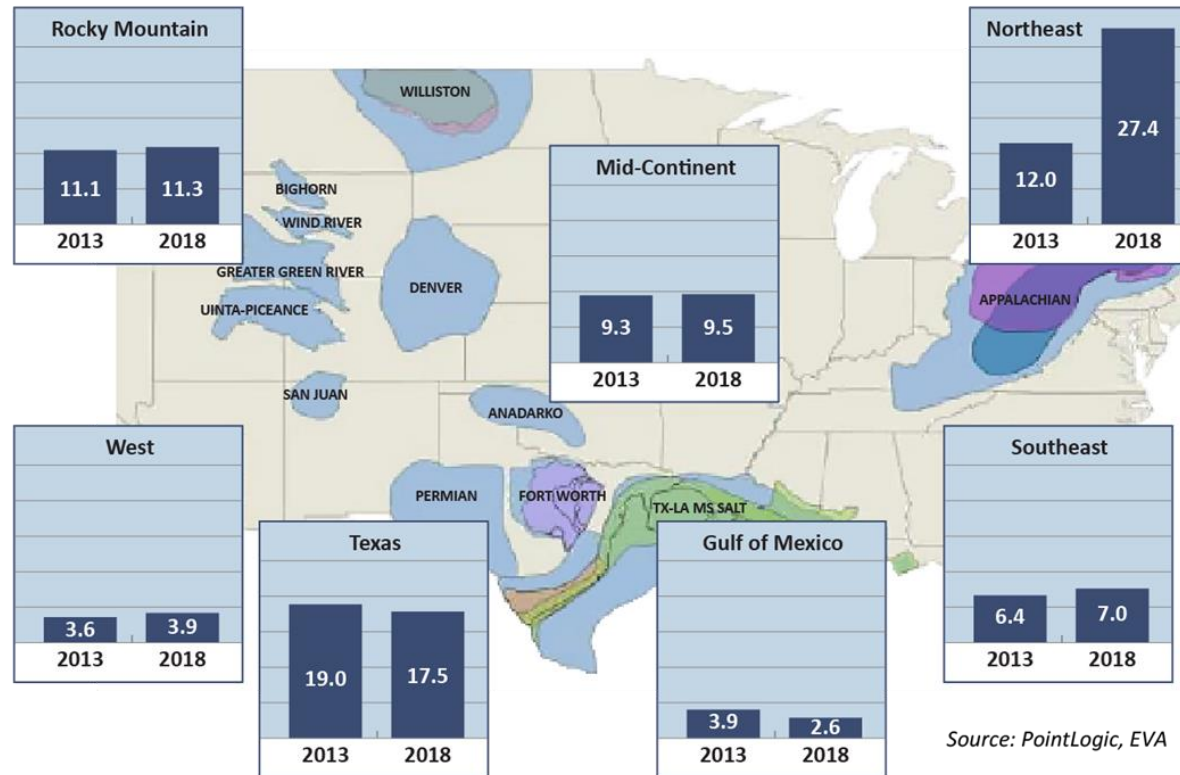
Natural Gas Production Grew 46% Since 2005 While Prices Declined 65%

U.S. Dry Natural Gas Production and Henry Hub Price



Supply: Record Growth in Production Continues

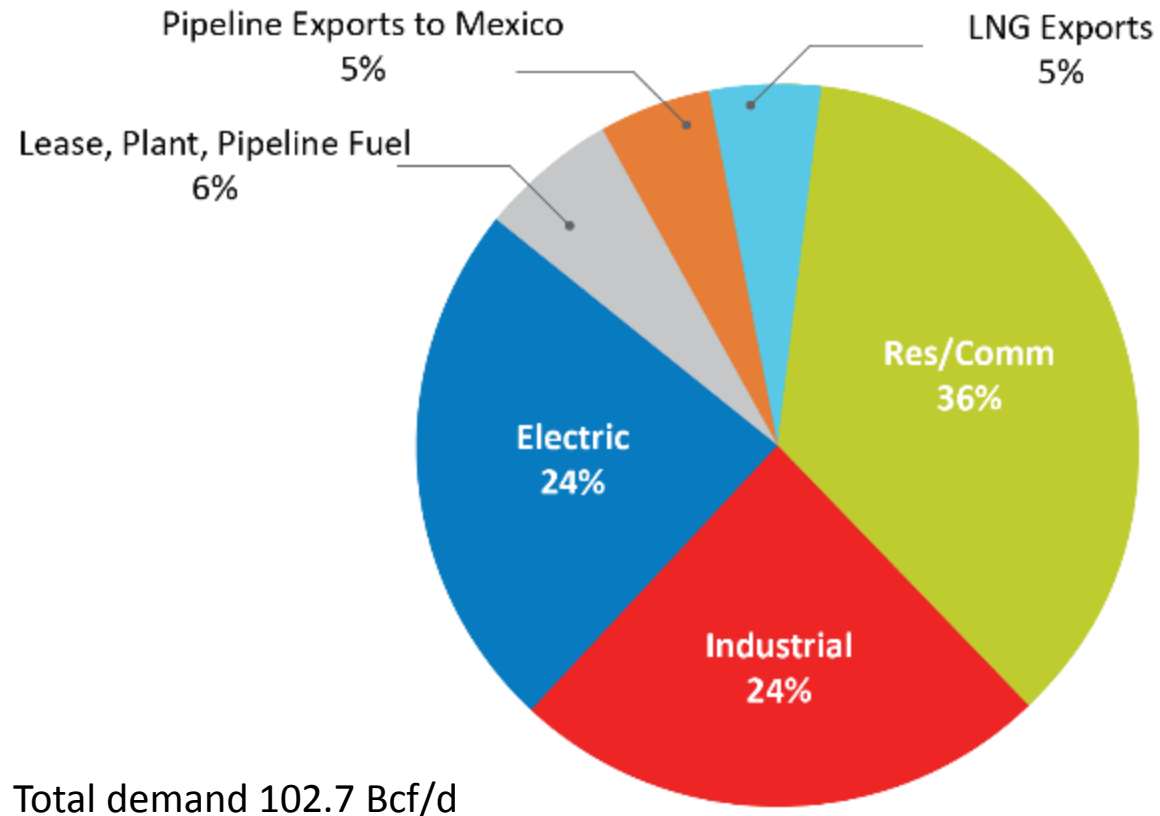
14 BCFD GROWTH IN U.S. GAS PRODUCTION FROM 2013 TO 2018 YTD, OR 21%



Source: PointLogic, EVA

Big Increase in Exports, But Remain Small Share of All Natural Gas Demand

Natural Gas Demand Sectors Winter 2018-2019



Industrial Demand Peak Growth Phase

Natural Gas Spurring 46 Major Industrial Projects 2018–2023

\$79 Billion
Investment to Build

Increase of 2.1
Bcf/d by 2023

32 New Projects

29 Petrochemical
2 Fertilizer
1 Steel

7 Expansions

7 Petrochemical

7 Re-starts

4 Steel
2 Aluminum
1 Petrochemical

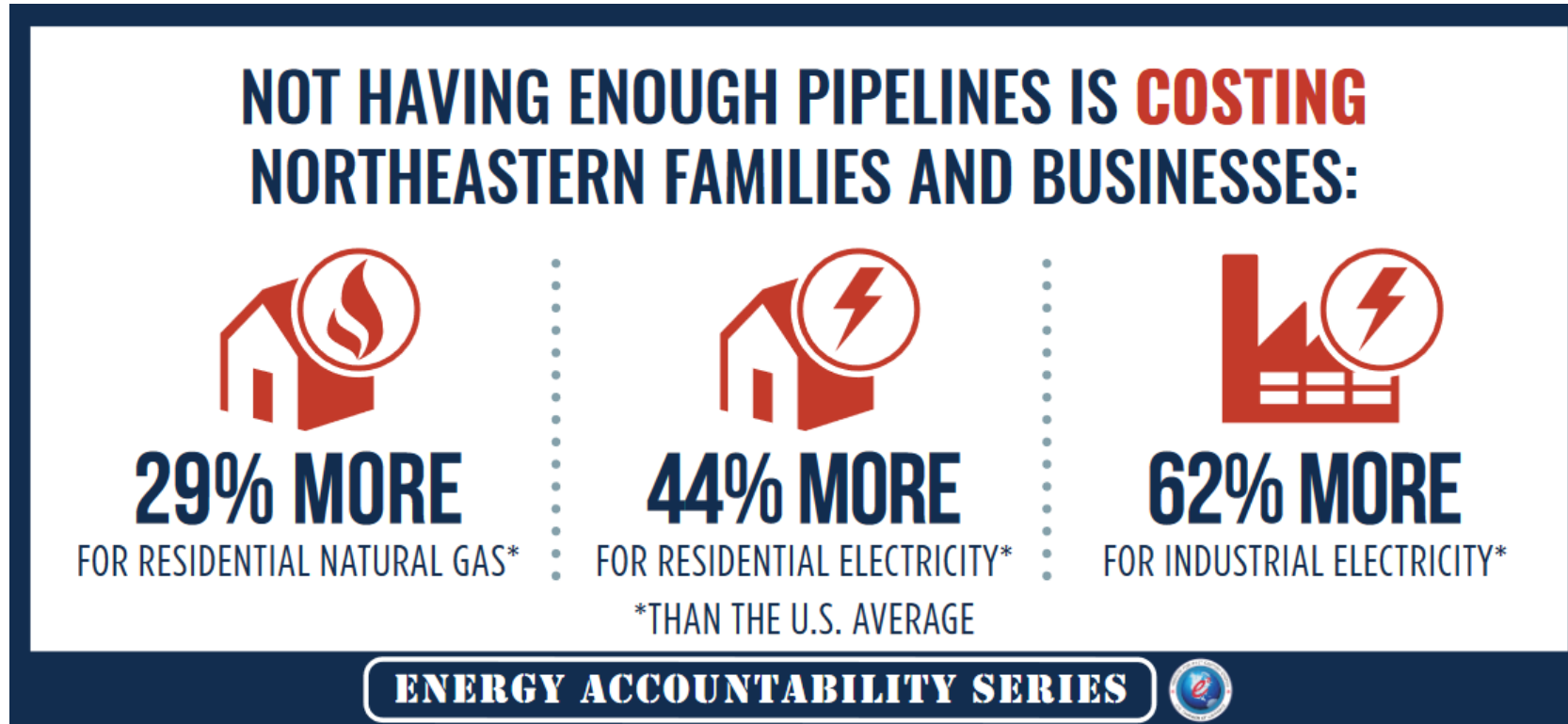
In addition to

33

COMPLETED
Projects for
additional \$53 Billion
and 1.5 Bcf/d from
2015-2017



Families and Businesses Are Paying the Cost of Non-Action



Source: U.S. Chamber of Commerce Institute for 21st Century Energy
“What If ... Pipelines Aren’t Built into the Northeast”

About NGSA

- Represents major producers and suppliers of domestic natural gas
 - Integrated and independent companies: 14 members
 - Founded in 1965
- Only national natural gas association representing producers and suppliers with a dedicated focus on downstream issues
- Promotes benefits of competitive natural gas markets, resulting in reliable and efficient transportation and delivery, increased supply and demand
- Combined with the Center for LNG