



# An American Renaissance

*R. Skip Horvath*

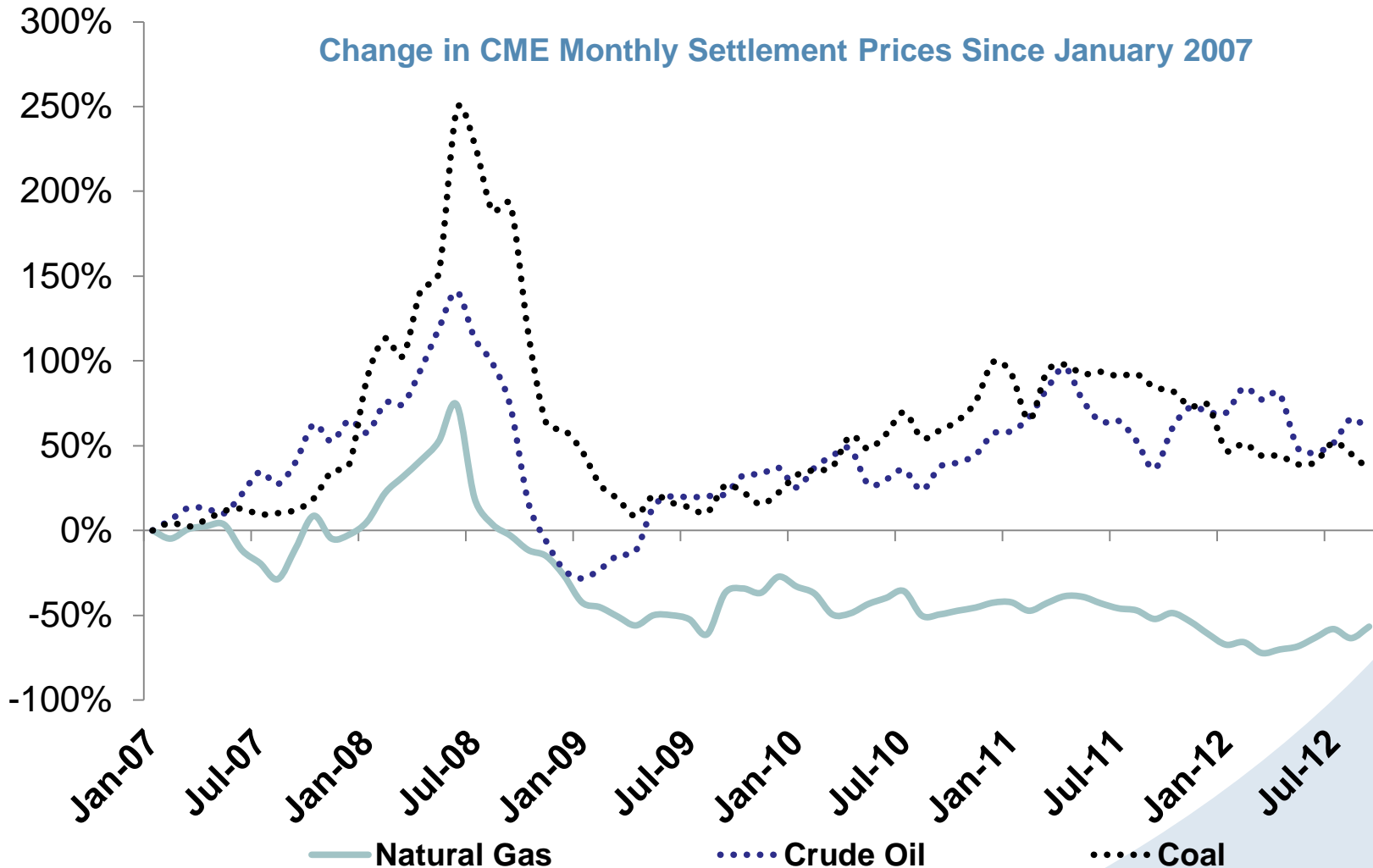
*President & CEO*

*Natural Gas Supply Association*

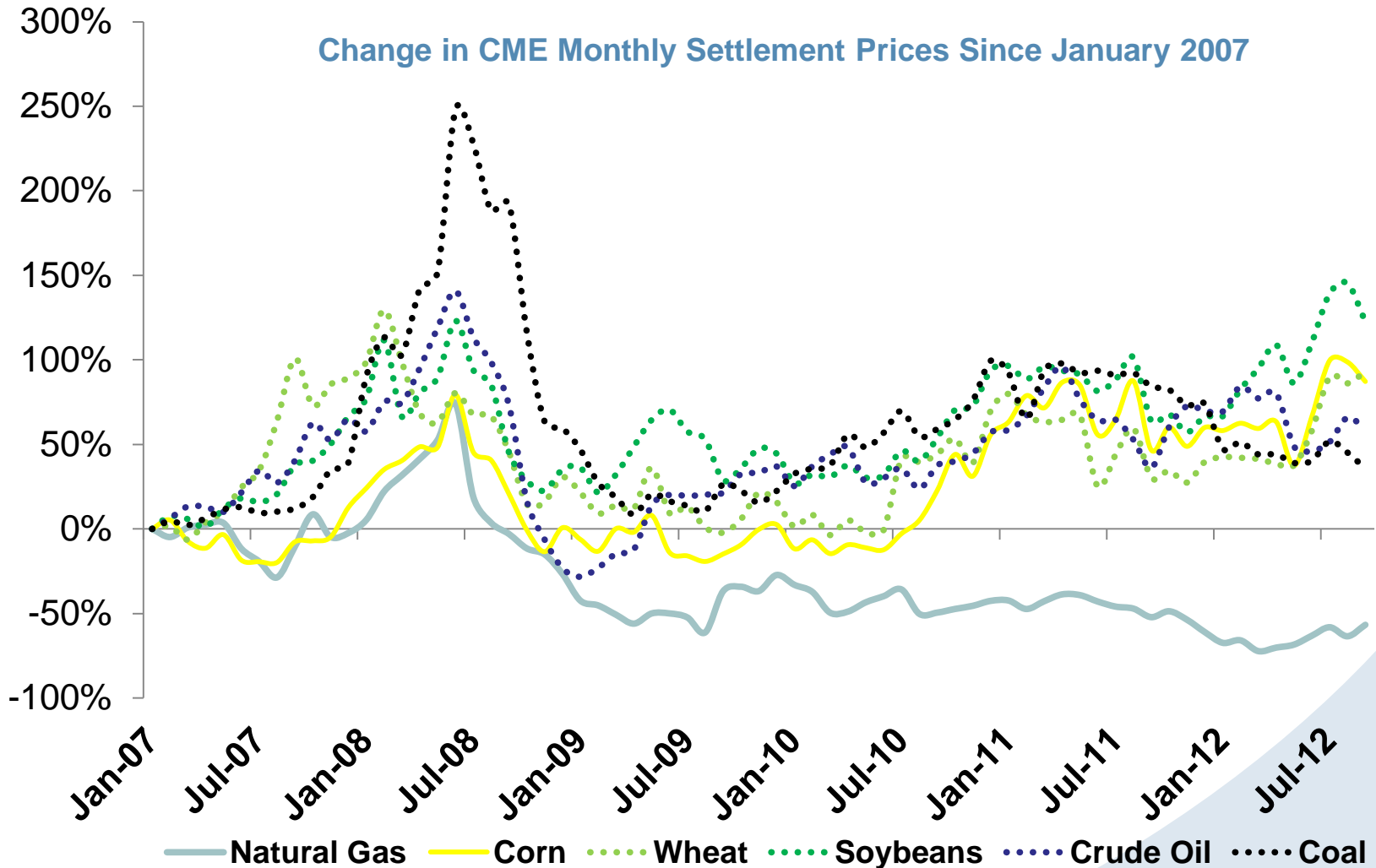
*Presented at US Energy Association*

*January 16, 2013*

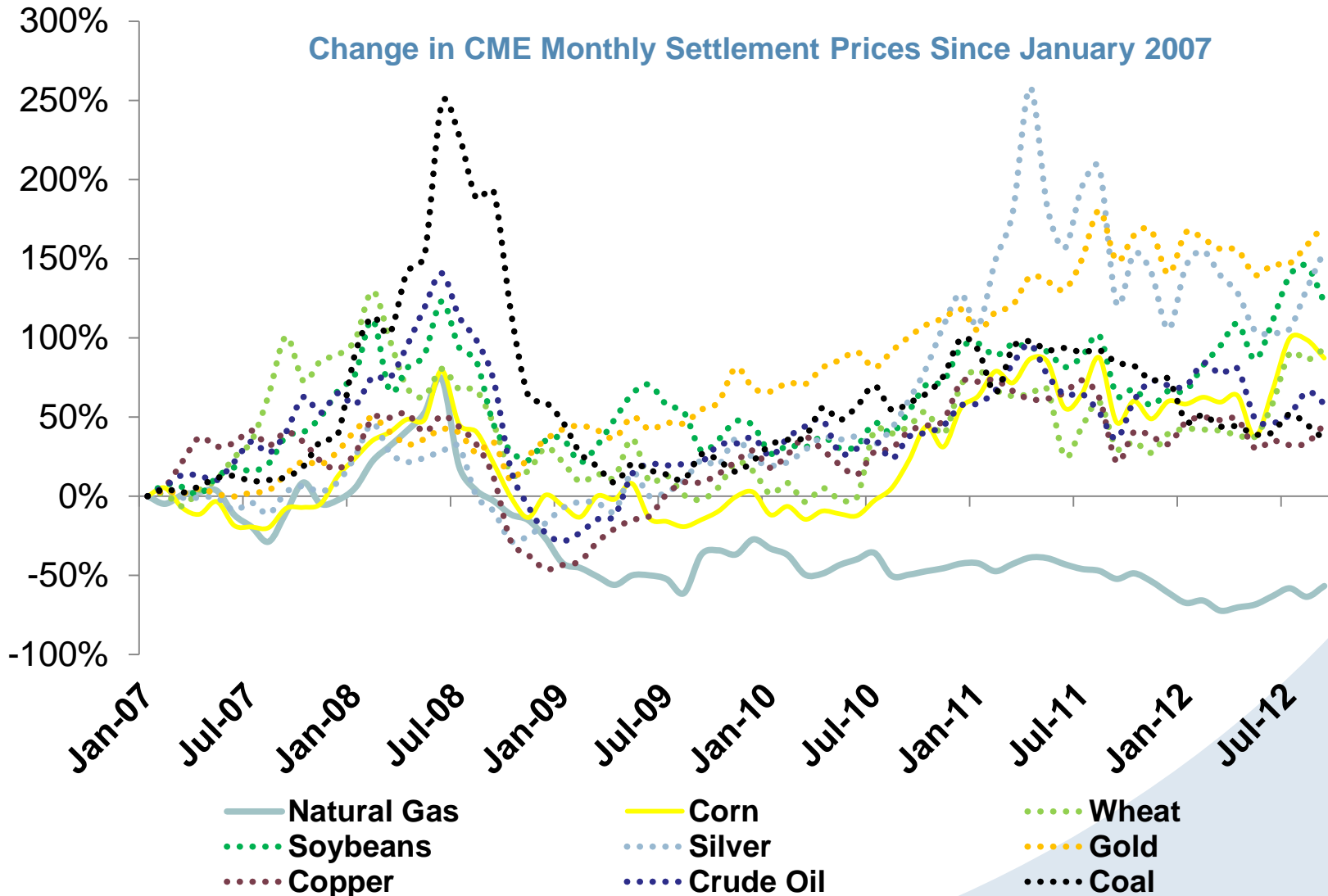
# Natural Gas: Potential to Lead Economic Renaissance



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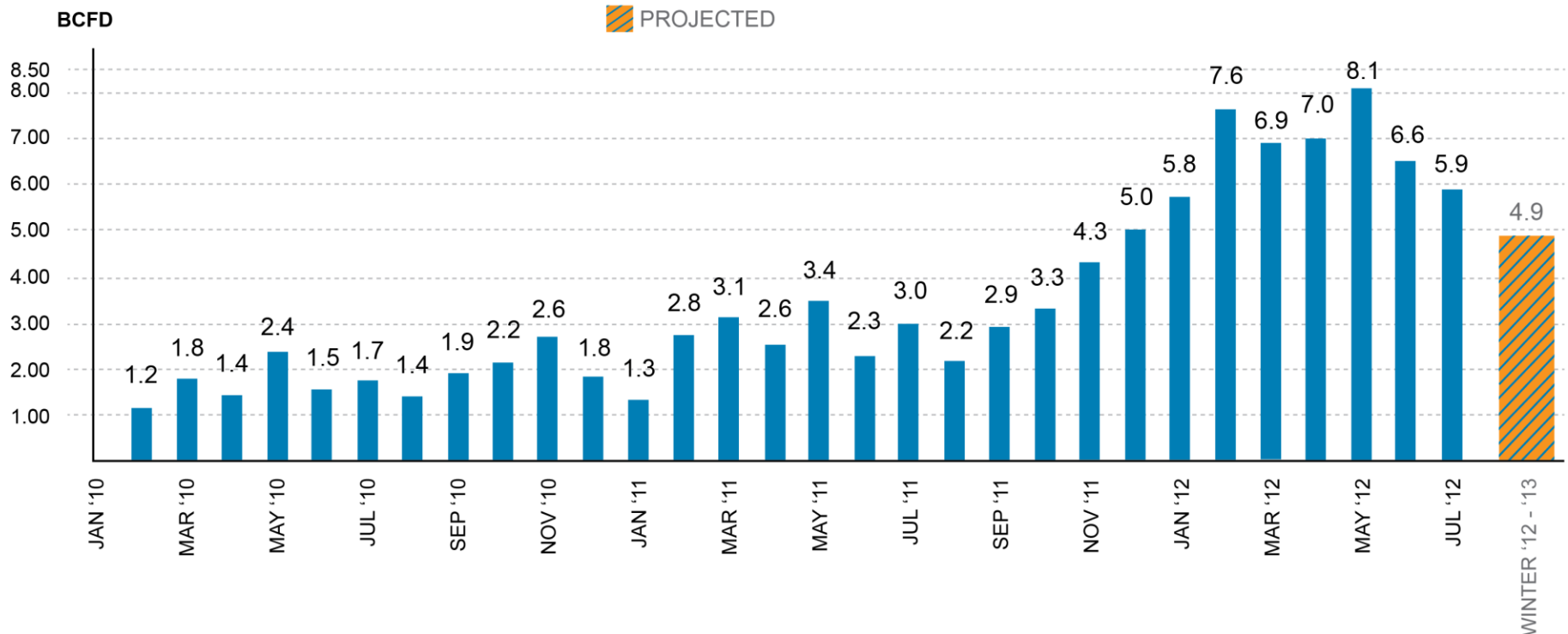


# Natural Gas: Potential to Lead Economic Renaissance



# Coal-to-Gas Switching Trend Continues

Still unprecedented amount of fuel switching, but projected less than 2012



# Natural Gas Spurring 50 Major Industrial Projects 2012-2018

**30**

## NEW PROJECTS

17 Petrochemical  
10 Steel  
1 Fertilizer  
1 Gas-to-liquids  
\*1 LNG

**15**

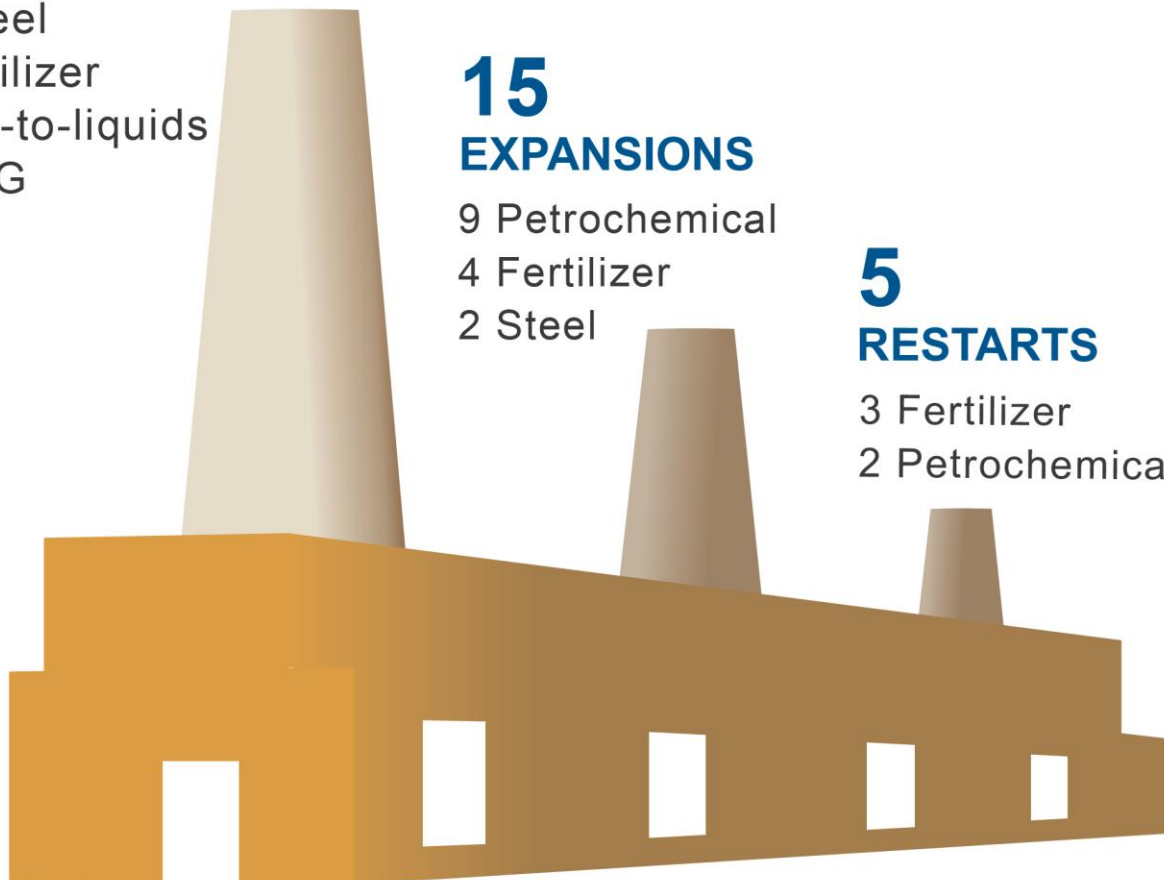
## EXPANSIONS

9 Petrochemical  
4 Fertilizer  
2 Steel

**5**

## RESTARTS

3 Fertilizer  
2 Petrochemical



\*1 LNG project (Sabine Pass) with DOE/FERC approval

# Natural Gas Puts America to Work

- In addition to today's load, natural gas poised by 2020 to
  - Increase power gen (+ 0.5 Tcf)
  - Bring U.S. manufacturing back (+ 0.5 Tcf)
  - Supply NGV fleets and trucks (+ 0.1 Tcf)
  - Export to help balance of trade (+ 0.5 Tcf)
- While protecting environment, health, and safety in compliance with state and federal regulations