2017 Policy and Market Issues for Natural Gas Suppliers

USEA State of the Energy Industry Forum

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President and CEO, Natural Gas Supply Association
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Good News Story:
Size of U.S. Recoverable Natural Gas Resource Doubled in Last Decade

Shale resources remain the dominant source of U.S. natural gas production growth

U.S. dry natural gas production

trillion cubic feet

billion cubic feet per day

Source: EIA, Annual Energy Outlook 2015 Reference case
Producers Improve Ability to Produce at Lower Cost

Technological advances and efficiencies include the “walking rig”
LNG Exports: Launch of New Era
Also growth in Mexican Exports, Maritime Industry
**Industrial Demand: Natural Gas Spurring 71 Major Industrial Projects 2015–2021**

- **$121 Billion Investment to Build**
- **Increase of 3.7 Bcf/d**

<table>
<thead>
<tr>
<th>57 New Projects</th>
<th>14 Expansions</th>
</tr>
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<tbody>
<tr>
<td>47 Petrochemical</td>
<td>10 Petrochemical</td>
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<tr>
<td>10 Fertilizer</td>
<td>4 Fertilizer</td>
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</tbody>
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Data Source: Energy Ventures Analysis, June 2015

Photo courtesy: Chevron U.S.A. Inc., 2015 (Pascagoula)
Infrastructure Hurdles: Environmental Activism at New Heights
Largest natural gas event in world – comes to DC June 2018

4,000 delegates from around world, across value chain

Maximize opportunity to spread your message

Attend or exhibit

Coordinate meetings in DC to coincide with WGC