



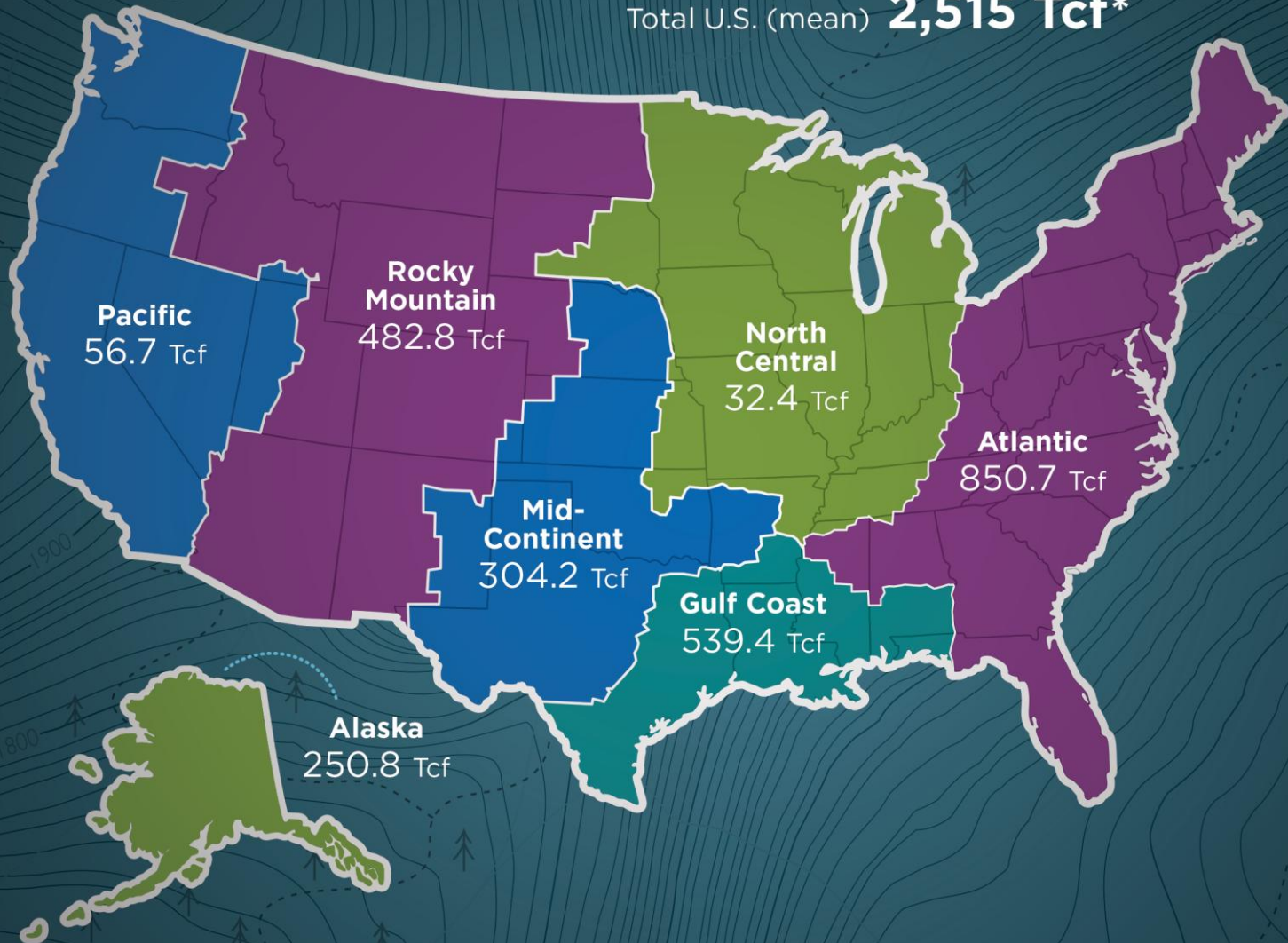
The Gas Advantage

Dave McCurdy
President and CEO



Natural Gas Regional Resource Assessment

Total U.S. (mean) **2,515 Tcf***

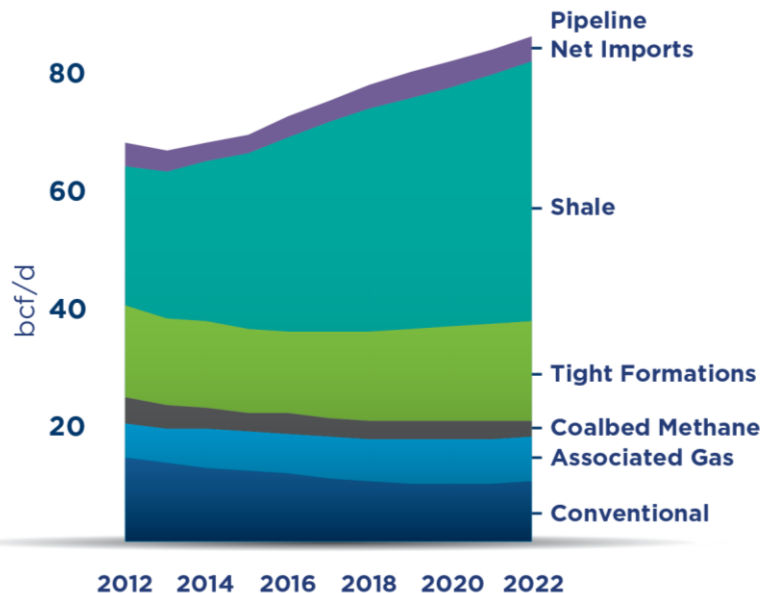


* Total numbers, listed in trillion cubic feet (Tcf), account for traditional, coalbed and offshore natural gas resources
Data source: Potential Gas Committee (2015) | Separately aggregated from all province data.

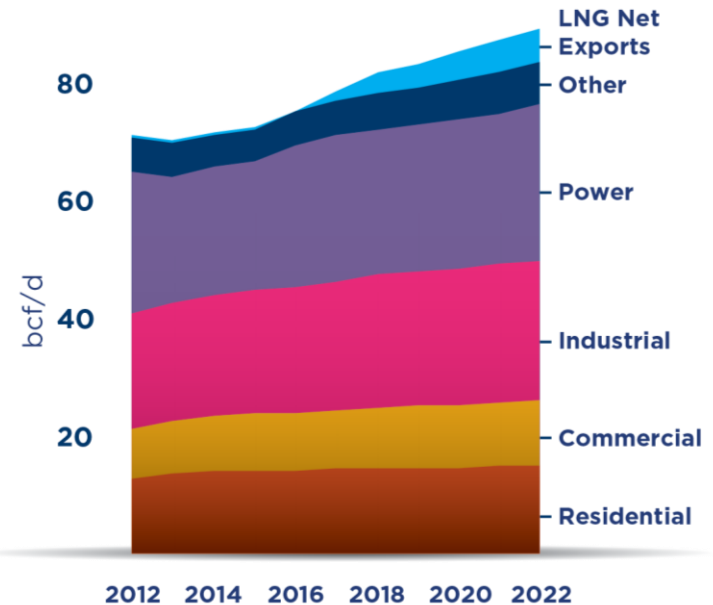
The Promise of Natural Gas

For the next decade and beyond, domestic natural gas supplies are expected to be sufficiently robust to meet growth in demand across all sectors.

Natural Gas Supply



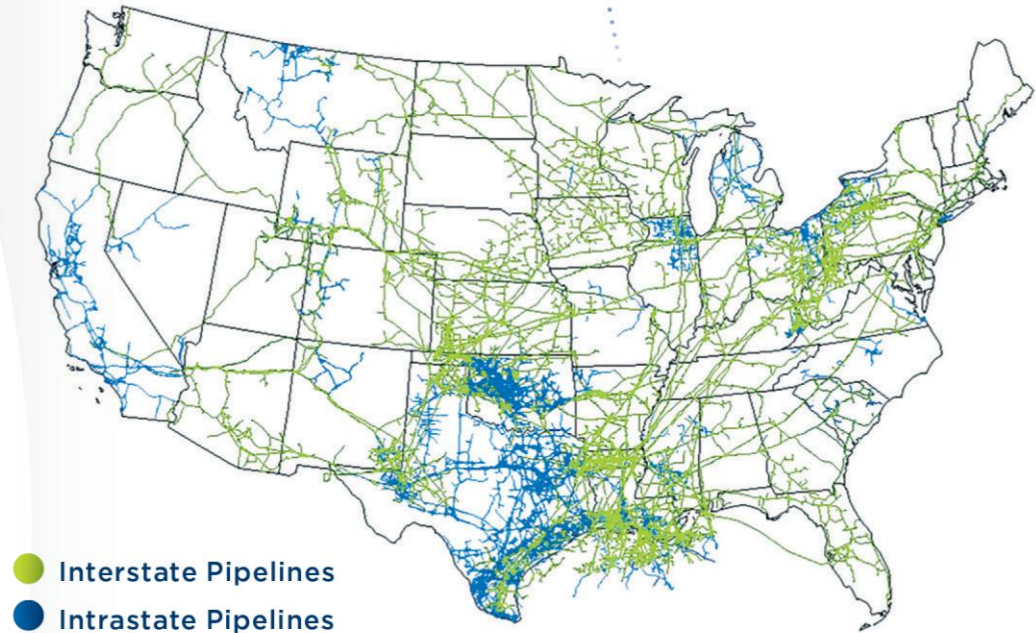
Natural Gas Use



Safely transported **Across the Country**

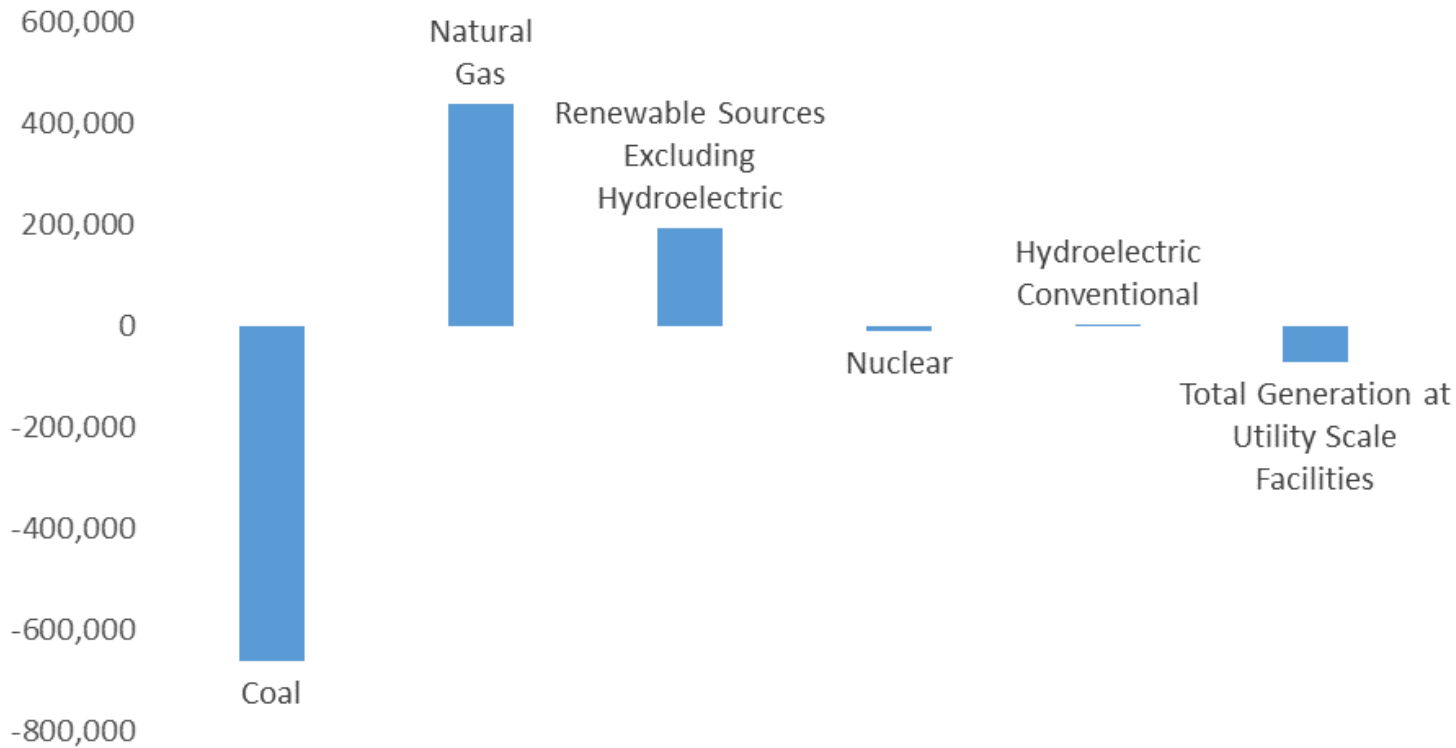
Natural gas pipelines, which transport approximately one-fourth of the energy consumed in the U.S., are an essential part of the nation's infrastructure. Transportation by pipeline is the safest form of energy delivery in the country.

2.5
MILLION
miles of pipeline



Massive change in the U.S. power sector

Net Electricity Generation by Energy Source,
Change 2007-2015
(Thousand MWh)



EIA Electric Power Monthly

Is the Clean, Efficient Choice

Direct use, which can cut carbon emissions nearly in half, refers to natural gas consumed directly in appliances for heating and cooling, water heating, cooking and clothes drying.



Consumers can immediately save on their monthly utility bills through converting their households to natural gas.

Direct Use of Natural Gas

The direct use of natural gas in America's homes and businesses maintains about 92% of its usable energy, and a household with natural gas versus all-electric appliances produces 37% lower greenhouse gas emissions.

Converting to Electricity

Converting natural gas or any other fossil fuel into electricity to power comparable electric end-use products only maintains 32% of usable energy.

Natural Gas Means Savings for Consumers

- Households that use natural gas for heating, cooking and clothes drying spend an average of \$840 less per year than homes using electricity for those applications.
- Low domestic natural gas prices have led to savings of almost \$69 billion for residential natural gas customers over the past four years.

Average savings of
\$840
per year



Contributing to Cleaner Air

Natural gas is the cleanest alternative transportation fuel available and can provide particular benefits for ozone nonattainment areas.



CO

*Carbon monoxide
by 70 to 90%*

NOx

*Nitrogen oxides
by 75 to 95%*

CO₂

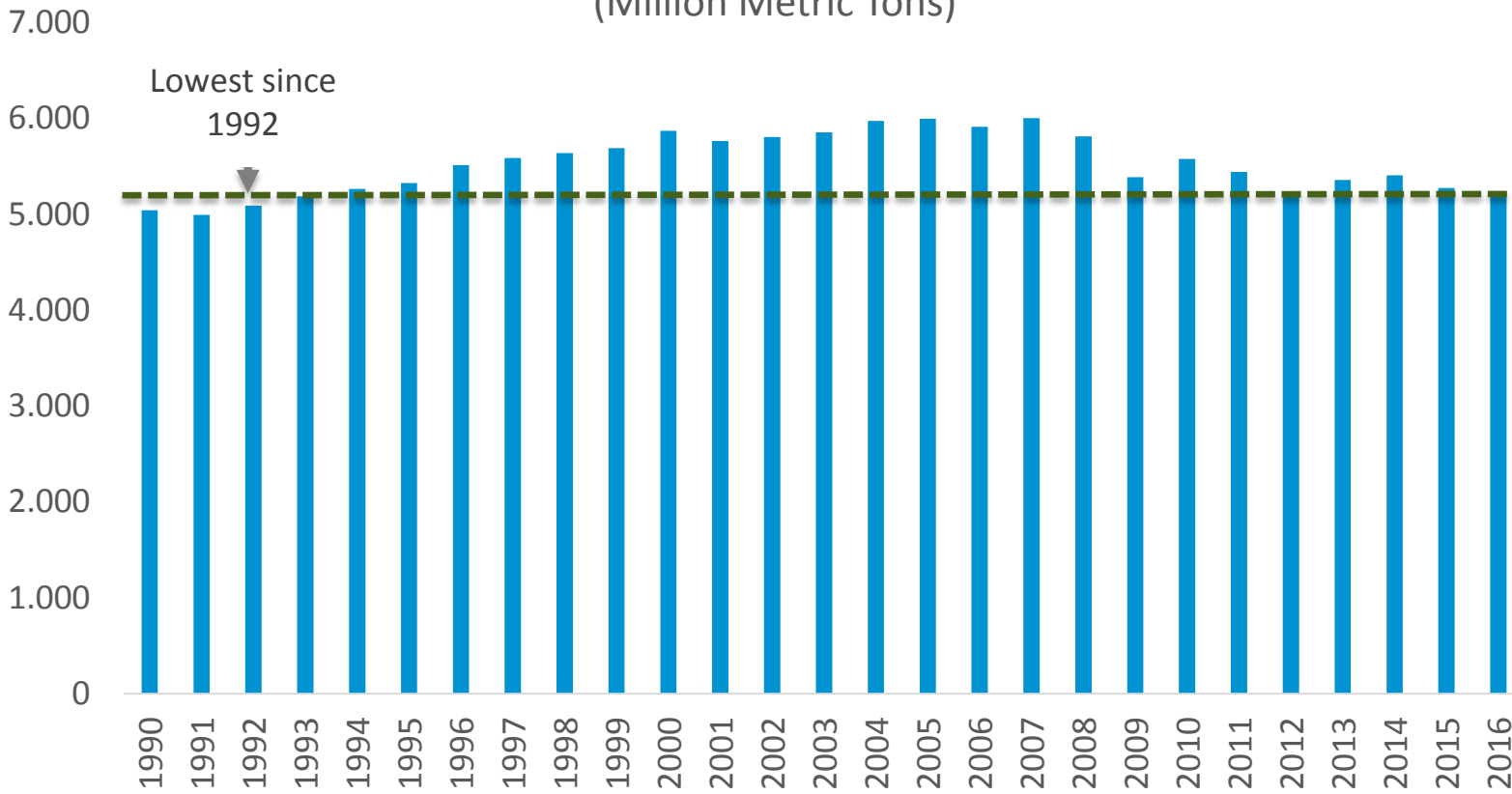
*Carbon dioxide
by 20 to 30%*

NMOC

*Non-methane organic
gas by 50 to 75%*

Energy-related CO2 emissions projected fall below 5.2 billion metric tons this year, lowest since 1992

US Carbon Dioxide Emissions from Energy Consumption
(Million Metric Tons)



FIA Monthly Energy Review

COP21

In 2015, a landmark climate agreement was adopted during the COP21 meeting of the United Nations Framework Convention on Climate Change.

The United States had a credible leadership role in the negotiations, in part because of the country's abundant supply of natural gas and the adoption of aggressive fuel economy standards, that have led to significant and continued declining emissions. Natural gas is part of the solution to climate change and will help the United States make progress toward the ambitious emissions reduction target set in Paris.



U.S. exports in
September are
up **53%** from
this month last
year.

170 Bcf

Total LNG exported or
scheduled today



U.S. exports 3.5-4 Bcf per day to Mexico



Source: EIA and industry sources



**27th WORLD GAS
CONFERENCE**

WASHINGTON DC

JUNE 25-29 2018

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