

U.S. Exports of LNG – A Manufacturers Perspective



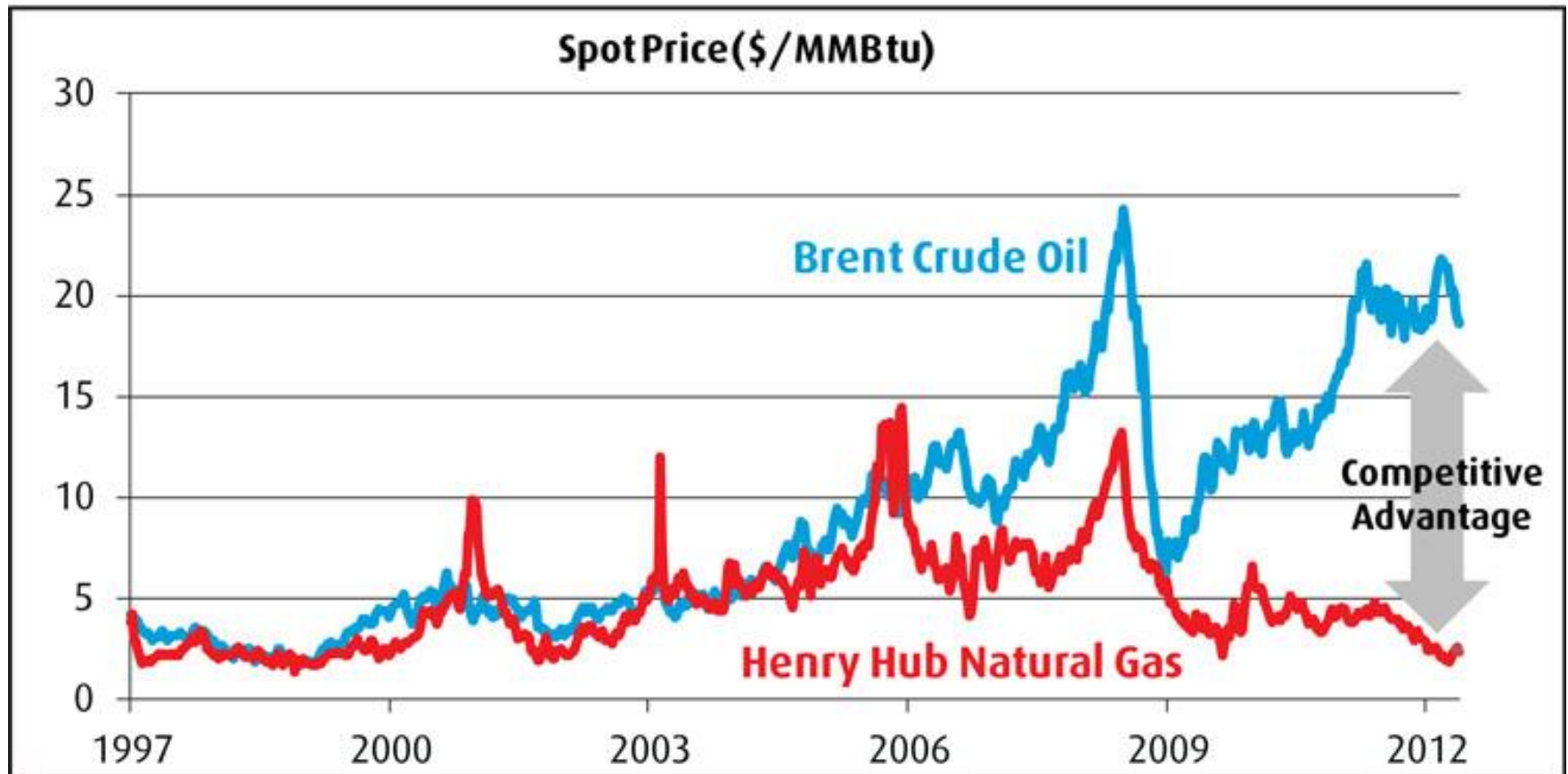
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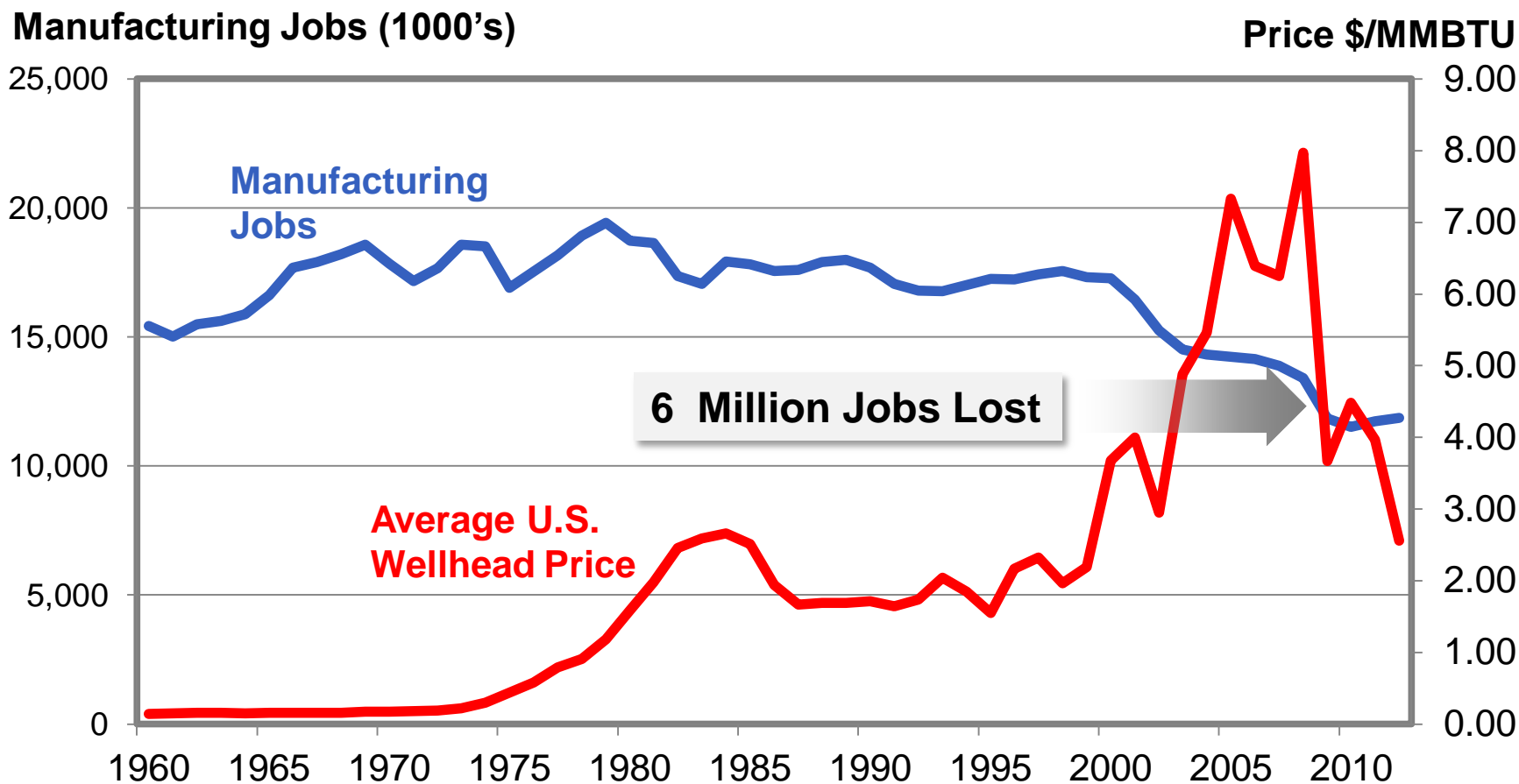
ENERGY Solutions

Shale Gas Fuels America's Competitive Advantage

New U.S. Competitive Advantage for Manufacturing



High & Volatile Gas Prices Means Fewer Jobs



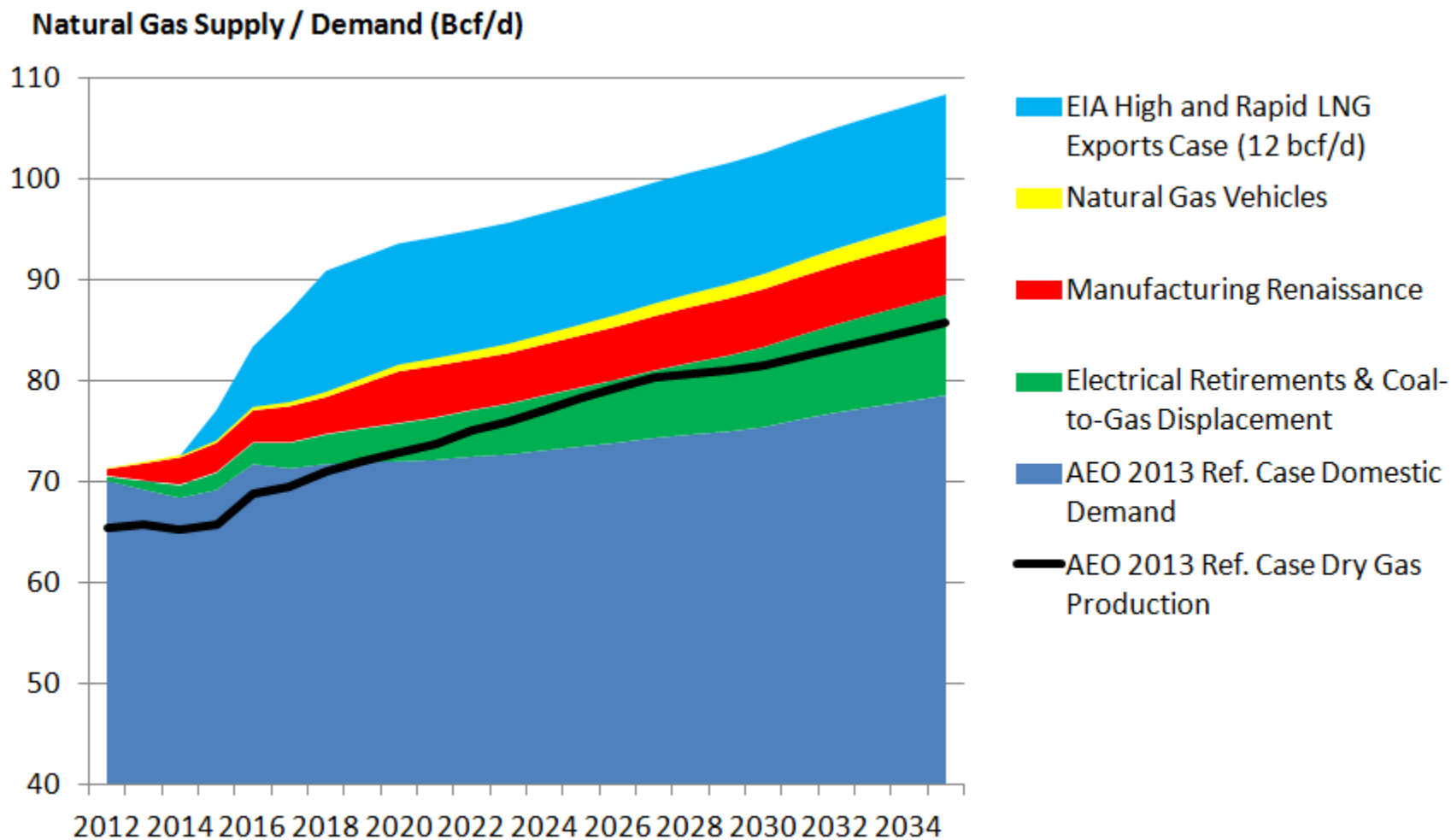
The Nation's Stake in Natural Gas

- 
- Aluminum
 - Chemicals
 - Fabricated Metal
 - Fertilizer
 - Foundries
 - Glass
 - Iron & Steel
 - Paper
 - Plastic & Rubber Products

**Growth across
Industries**

- \$208 billion economic activity boost
- 2 million jobs
- \$121 billion increase in output

New Demand Growth Requires Unprecedented Production



Up to 100% Increase in Demand

43 - 61 Bcf/d

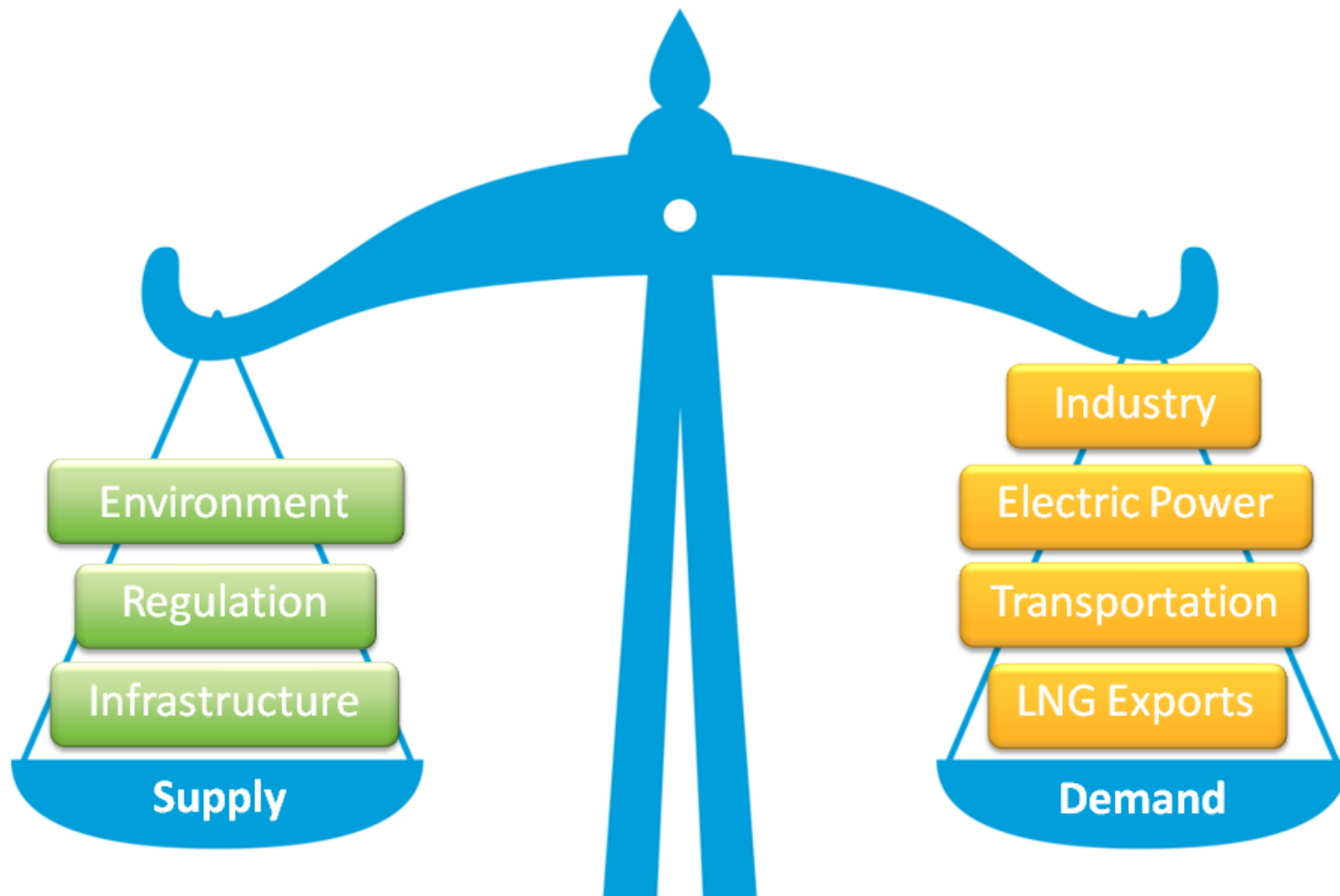
Manufacturing renaissance 8-10 Bcf/d

Replace 1/3 of U.S. coal fleet 10-12 Bcf/d

NGV 1-15 Bcf/d

Add 14 LNG export terminals 24 Bcf/d

Facing Uncertainties and Finding Balance



Recent Polling Data

In a survey of registered voters last month, voters made it clear that American natural gas should be used in the U.S.

- When asked how important manufacturing is in the U.S., more than half of voters gave it an importance of 10
- 80% of voters said “no” when asked if companies should be allowed to export gas without restriction
- 81% of voters said we should restrict exports until we have a better understanding of exactly how prices would react
- After being informed about the conclusions of the NERA report, voters are opposed to exports by a 5-to-1 margin

Uncertainty Calls for Prudence



Core Principles

- Increased production of natural gas
- “All the above” energy policy
- Long-term affordable, plentiful natural gas and NGLs
- Exports of LNG to FTA countries
- Robust “public interest” determination for exports to non-FTA countries
- Cautious, incremental approach to LNG exports
- Win-Win for producers, industry and consumers

Thank you!!!



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