



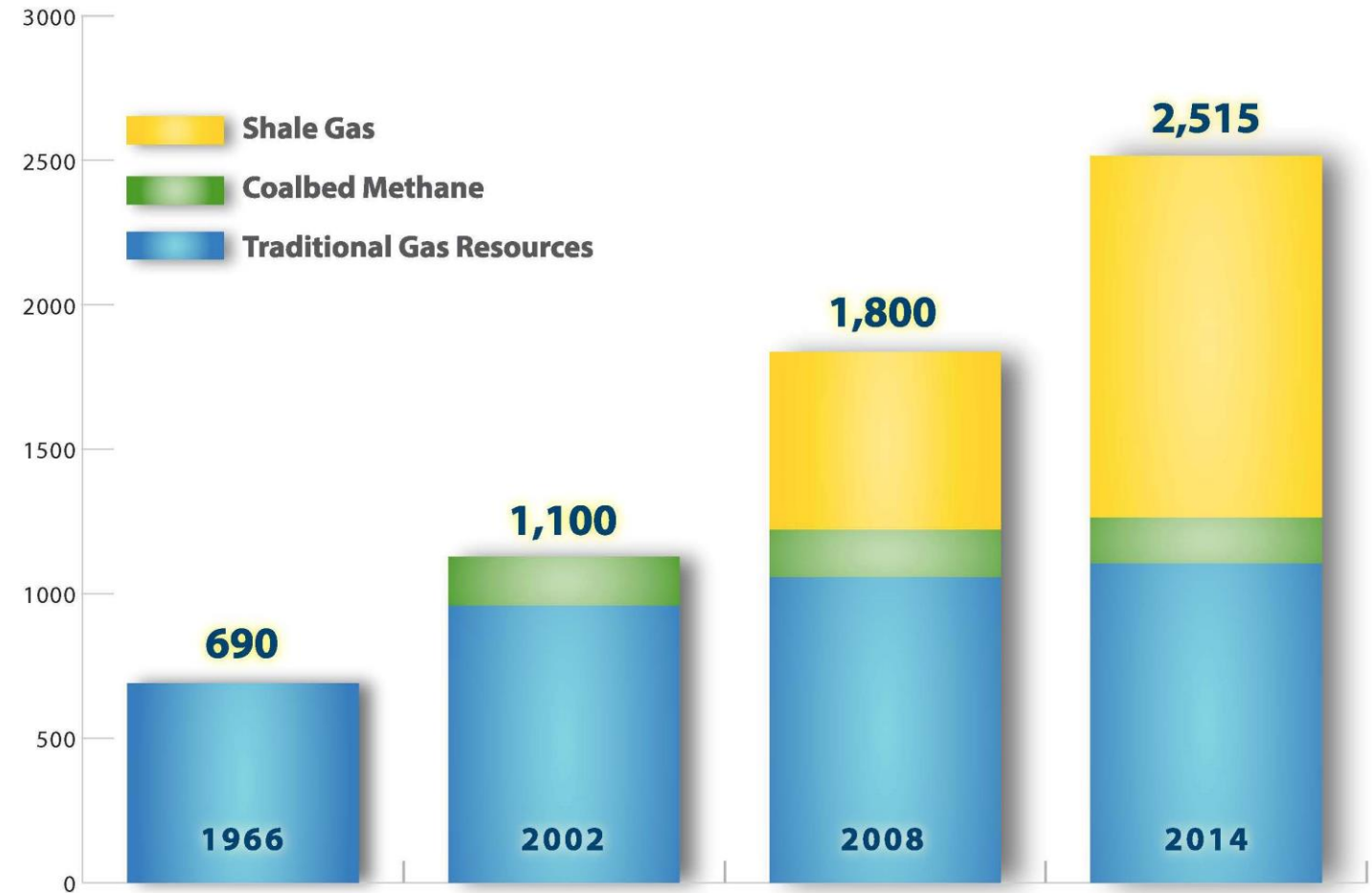
2017 Policy and Market Issues for Natural Gas Suppliers

USEA State of the Energy Industry Forum

Dena Wiggins,
President and CEO, Natural Gas Supply Association
January 31, 2017

WWW.NGSA.ORG

Good News Story: Size of U.S. Recoverable Natural Gas Resource Doubled in Last Decade



tcf

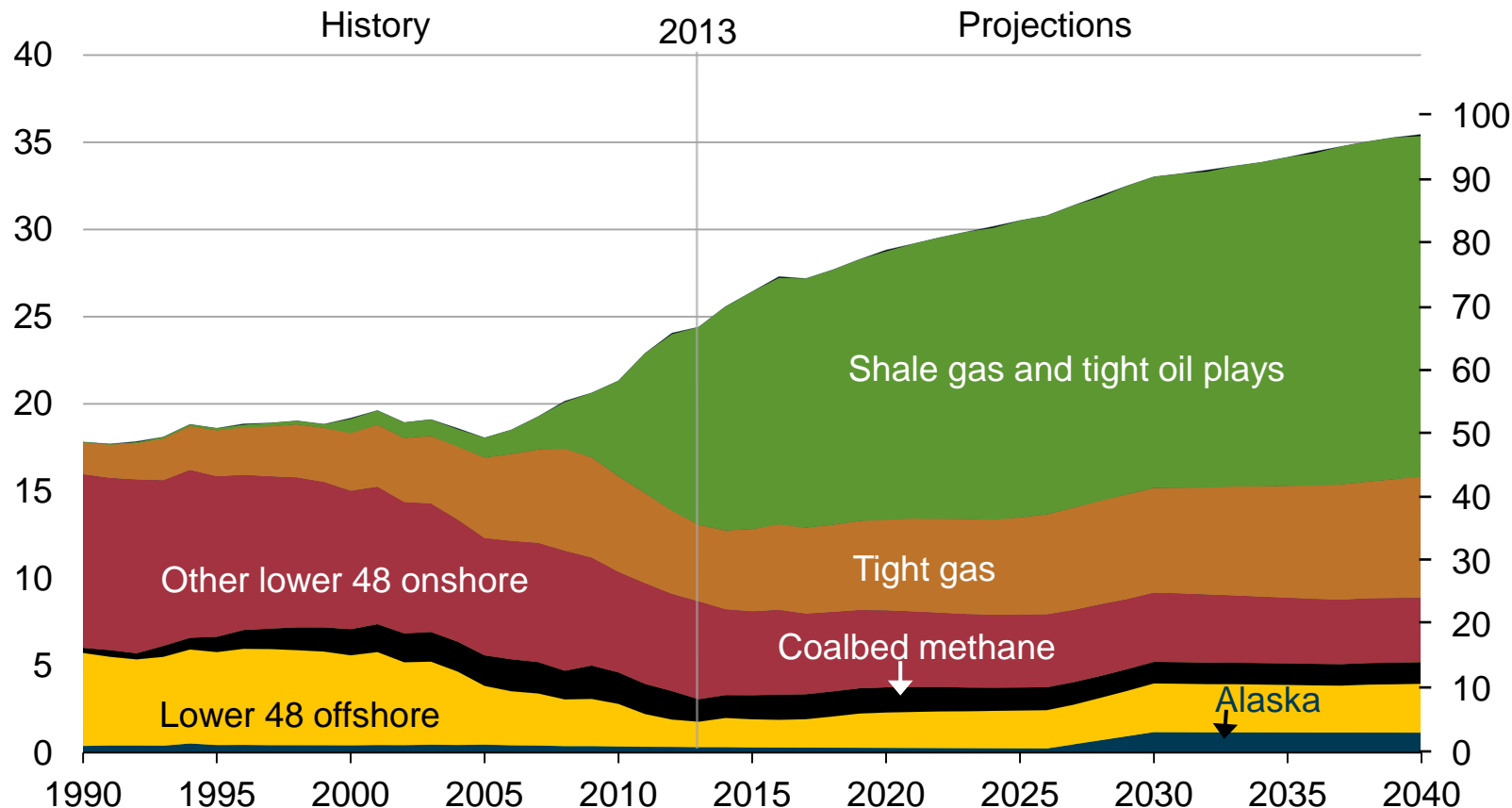
Source: *Potential Supply of Natural Gas in the U.S. 2014*, Potential Gas Committee, 2015

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

U.S. dry natural gas production

trillion cubic feet

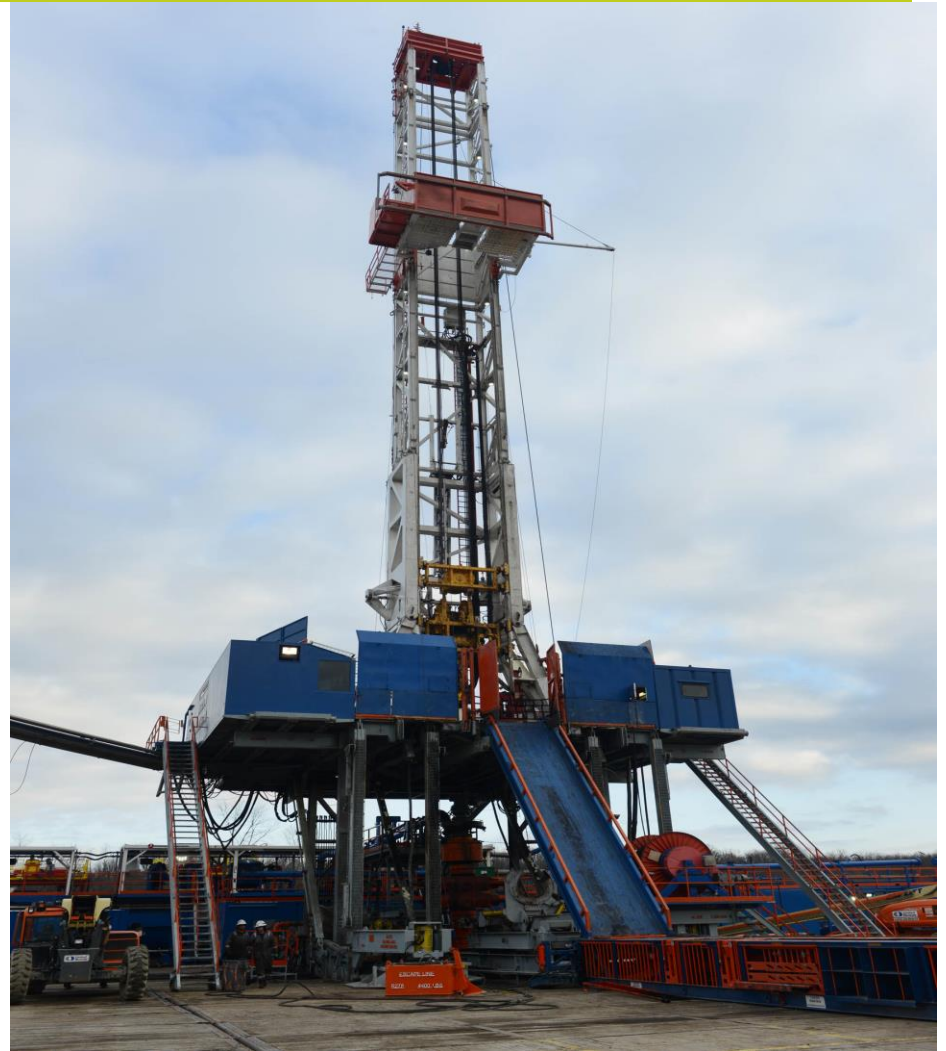
billion cubic feet per day



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

57

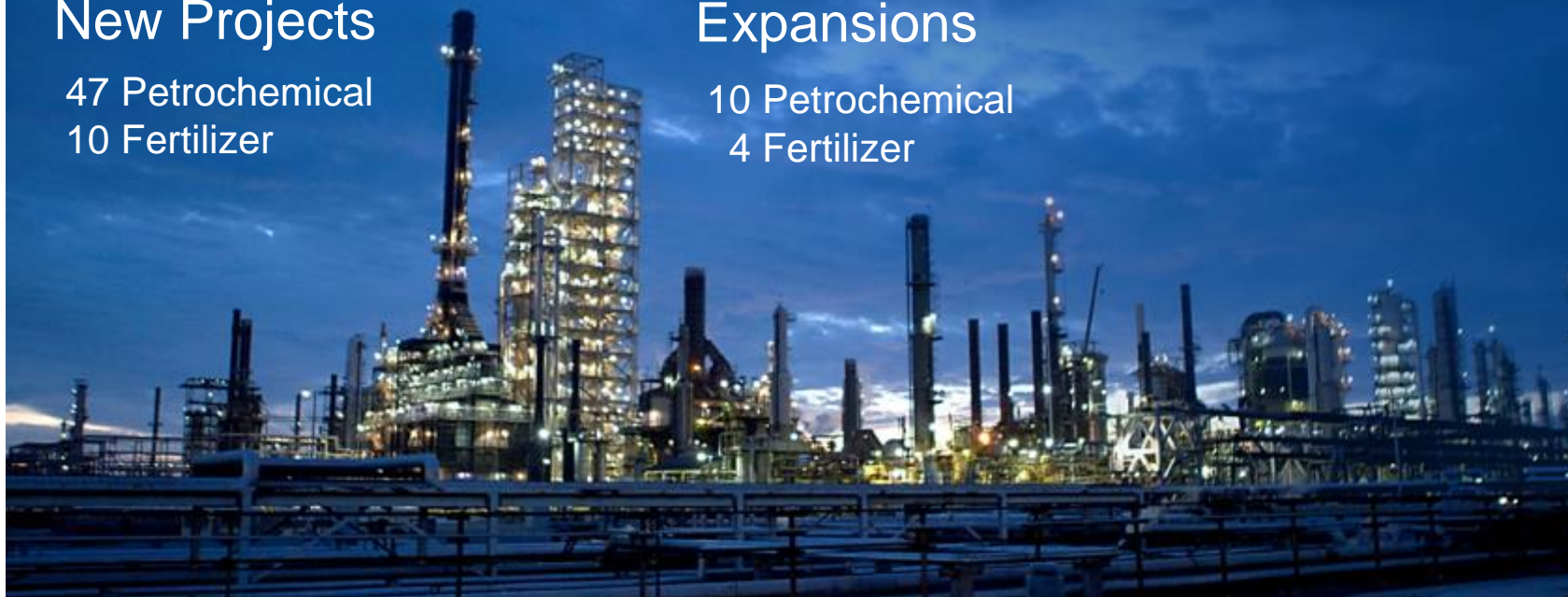
New Projects

47 Petrochemical
10 Fertilizer

14

Expansions

10 Petrochemical
4 Fertilizer



Infrastructure Hurdles: Environmental Activism at New Heights



World Gas Conference Washington, D.C. June 2018



27th WORLD GAS
CONFERENCE
WASHINGTON DC | JUNE 25-29
2018

- 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