



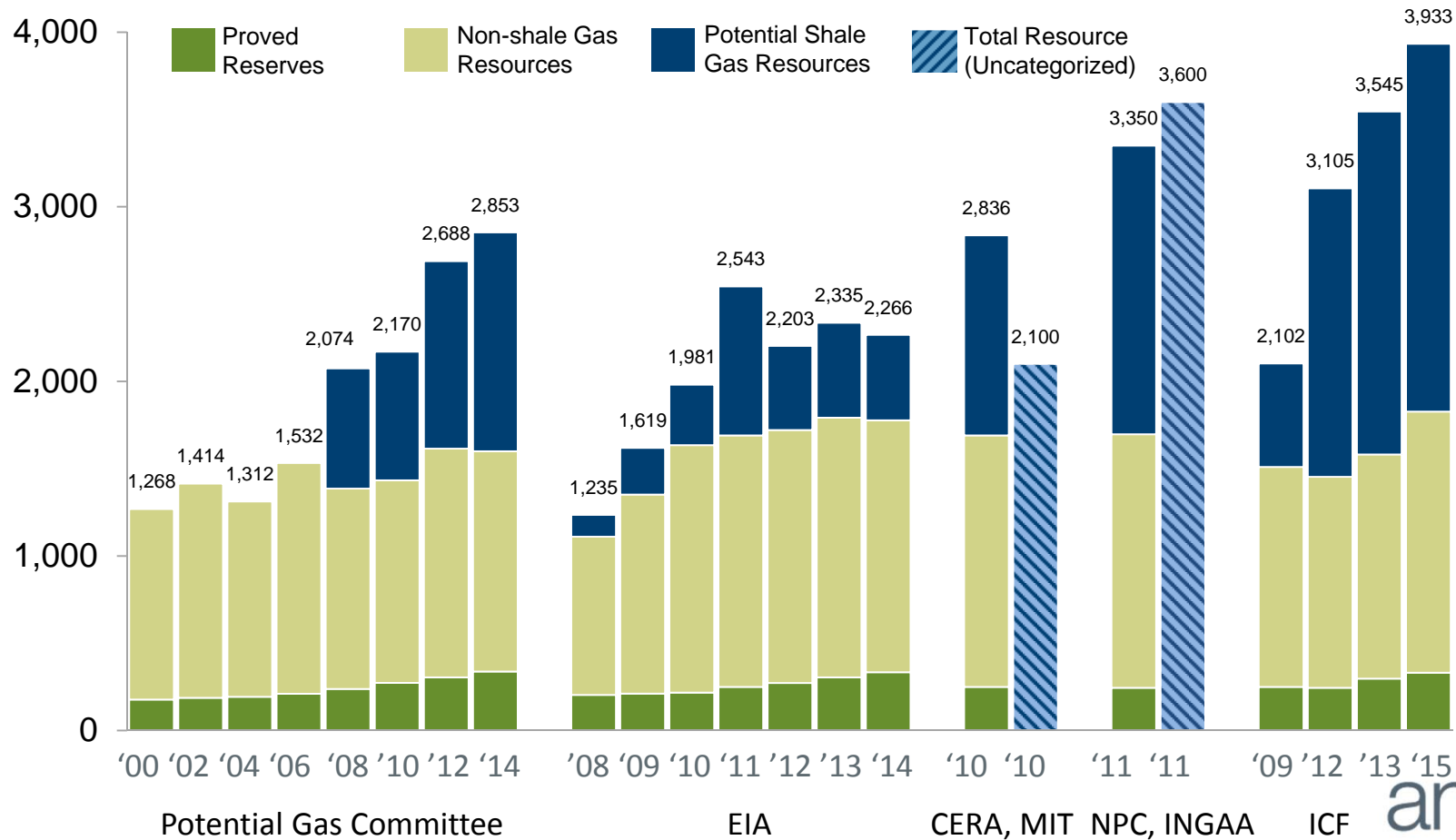
*Opportunities Presented by
Natural Gas Abundance*

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October 21, 2015
LSU Energy Summit
Baton Rouge, LA



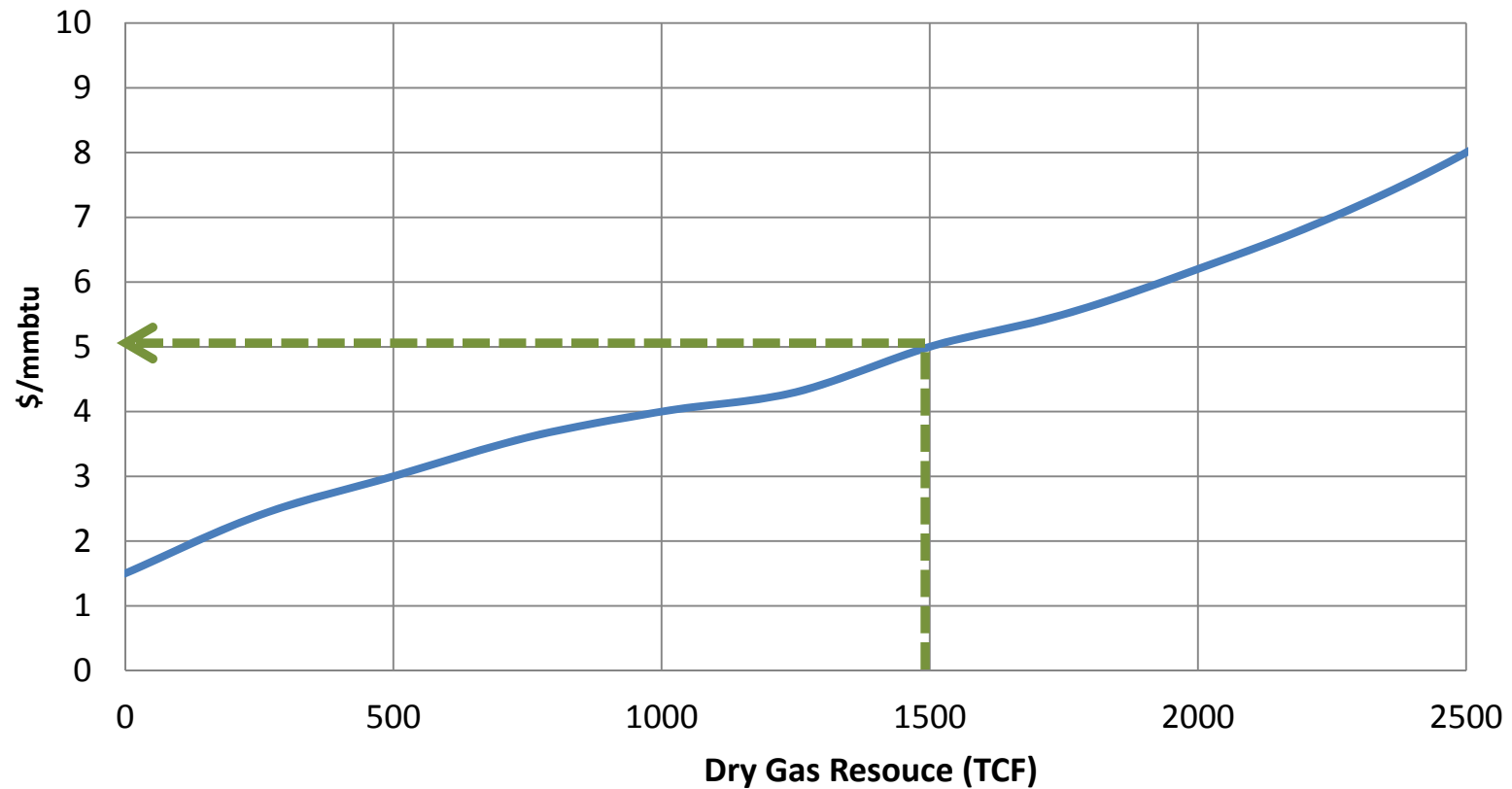
Abundant Supply

Estimates of U.S. Recoverable Natural Gas
(trillion cubic feet)



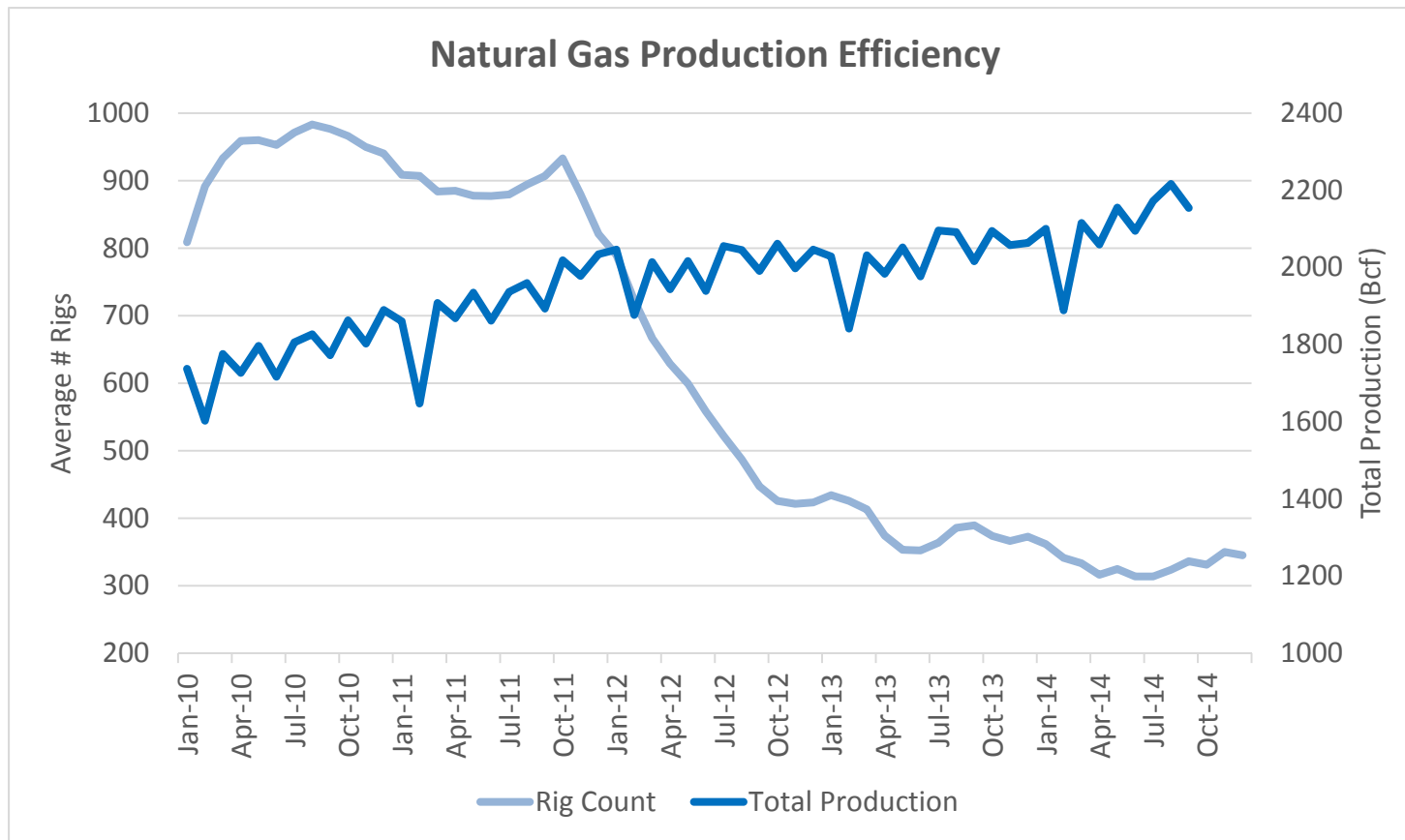
Reserves Volume and Cost

U.S. & Canada Supply Curve



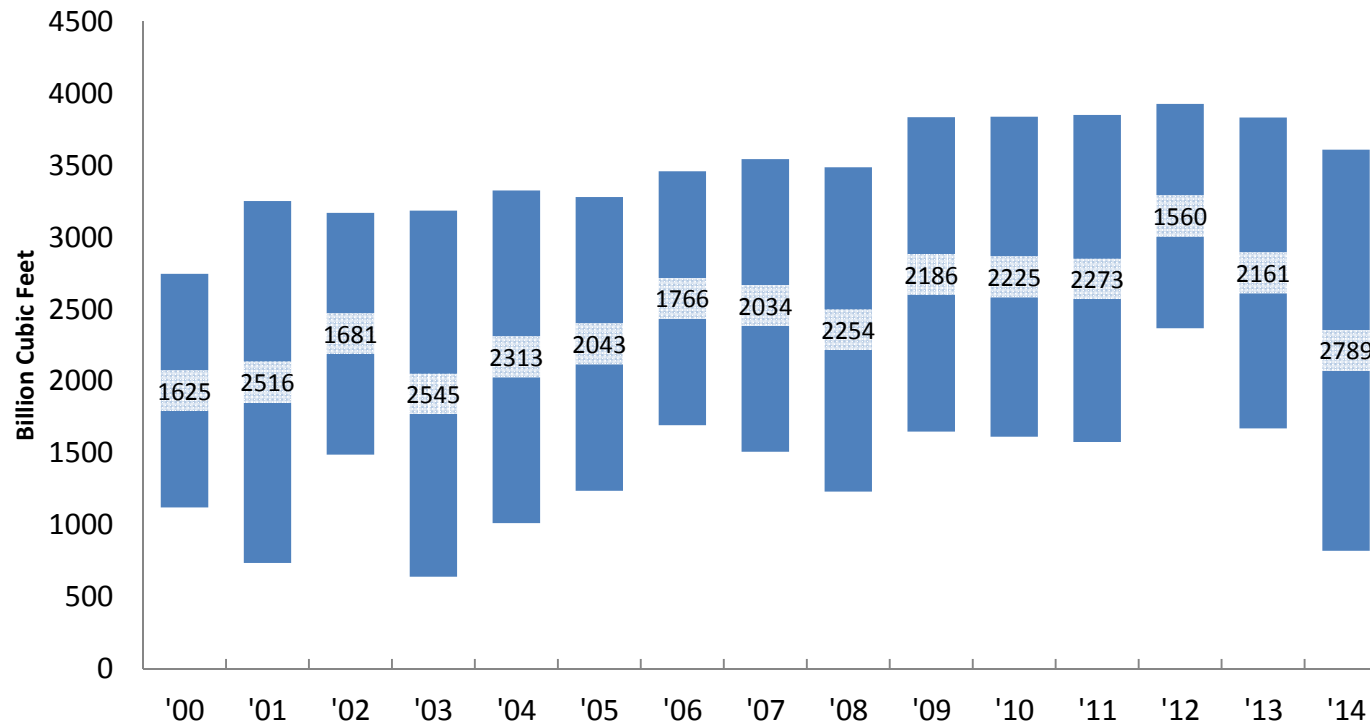
Source: ICF, "U.S. LNG Exports: Impacts on Energy Markets and the Economy", May 2013.

Production Efficiency



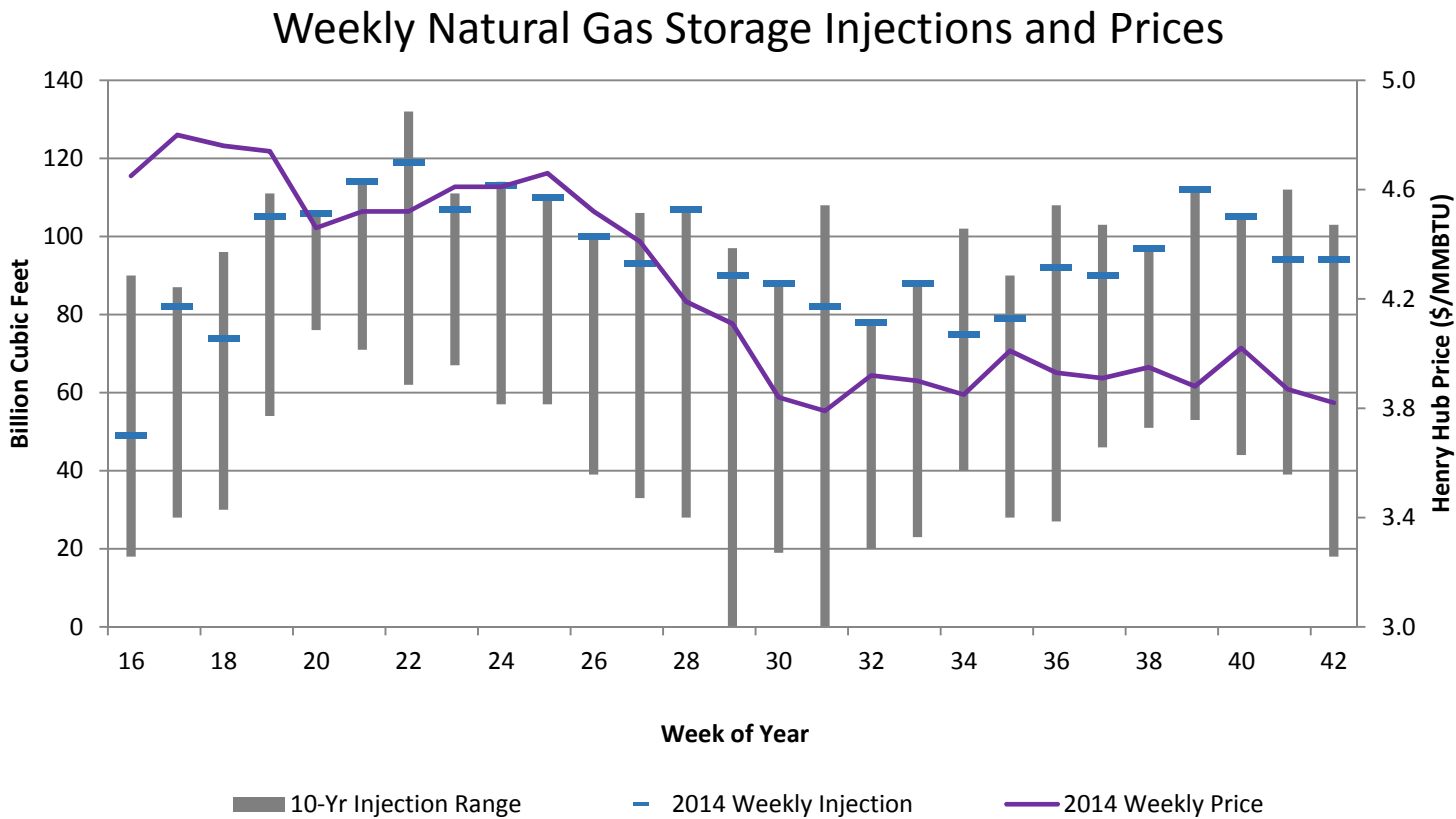
Source: EIA, Baker Hughes

Annual Storage Fills



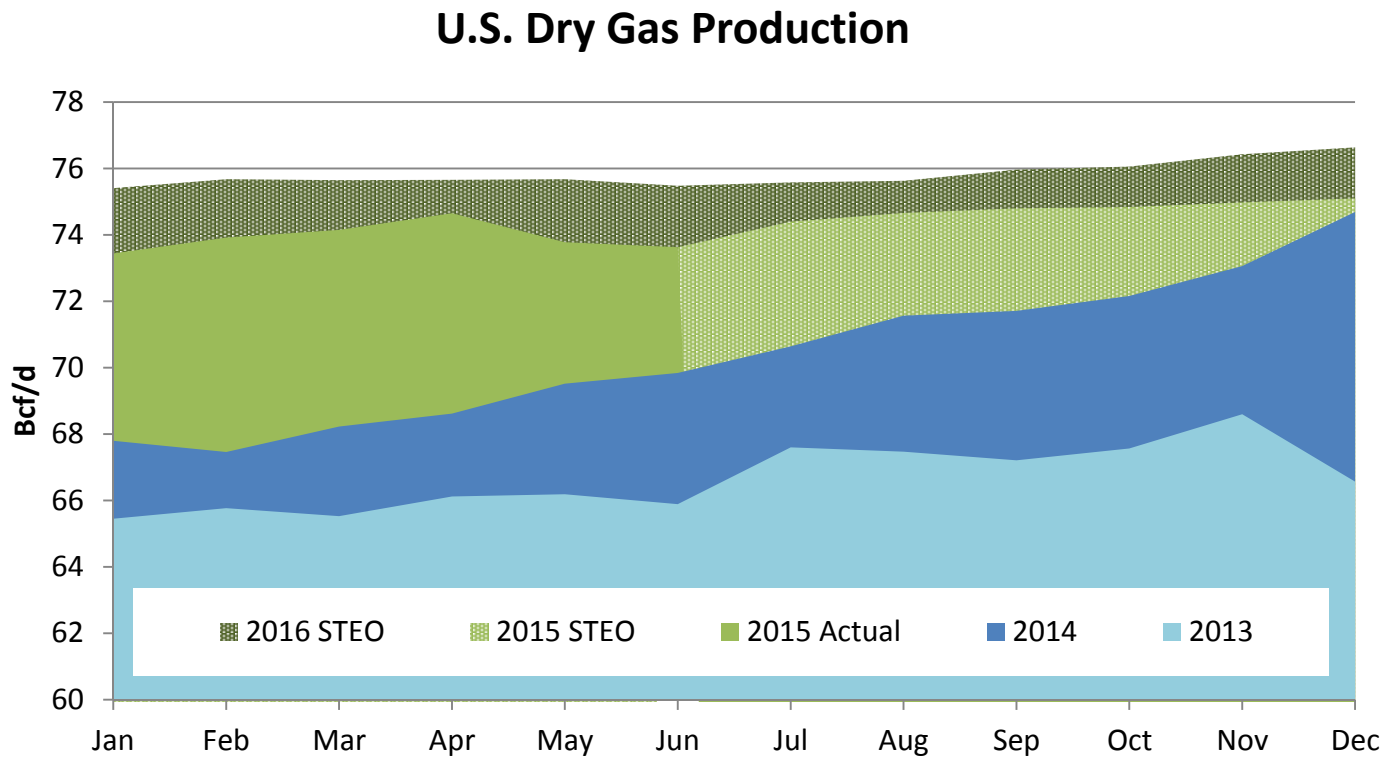
Source: EIA

2014 Weekly Storage Injections



Source: EIA, NYMEX Henry Hub Price

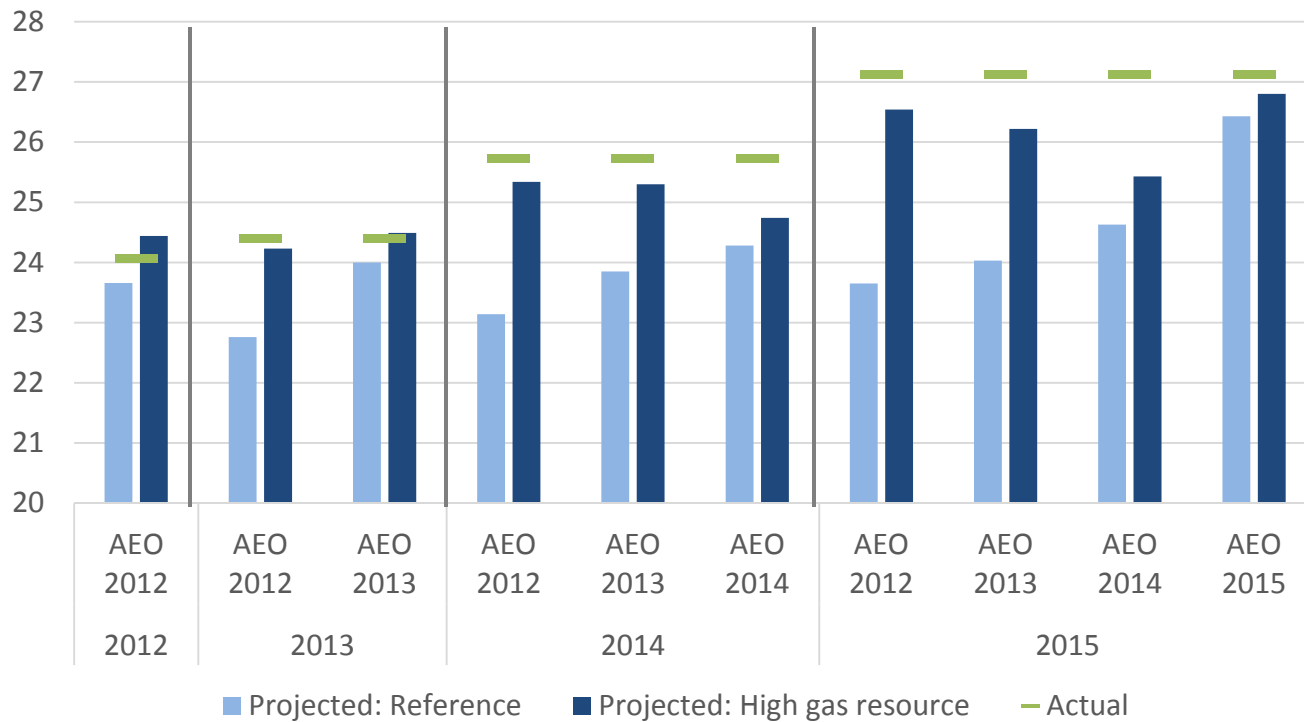
Current Production Trend



Source: EIA Short-term Energy Outlook, July 2015

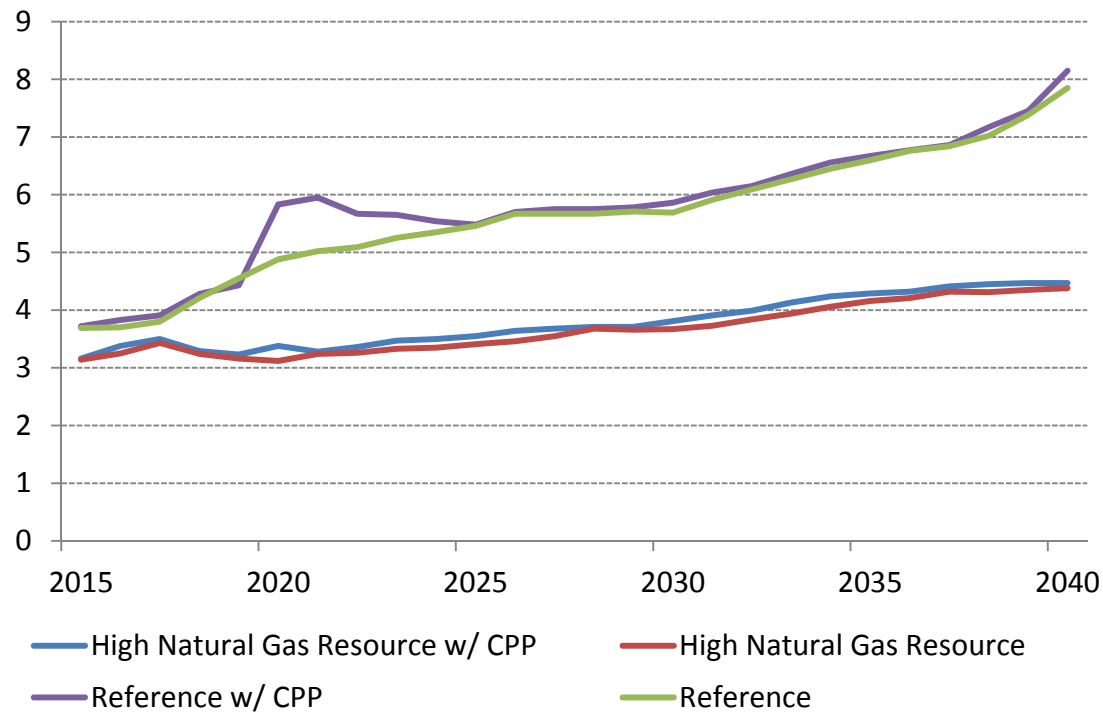
Projected vs Actual Production

U.S. Dry Gas Production by AEO Release (TCF)

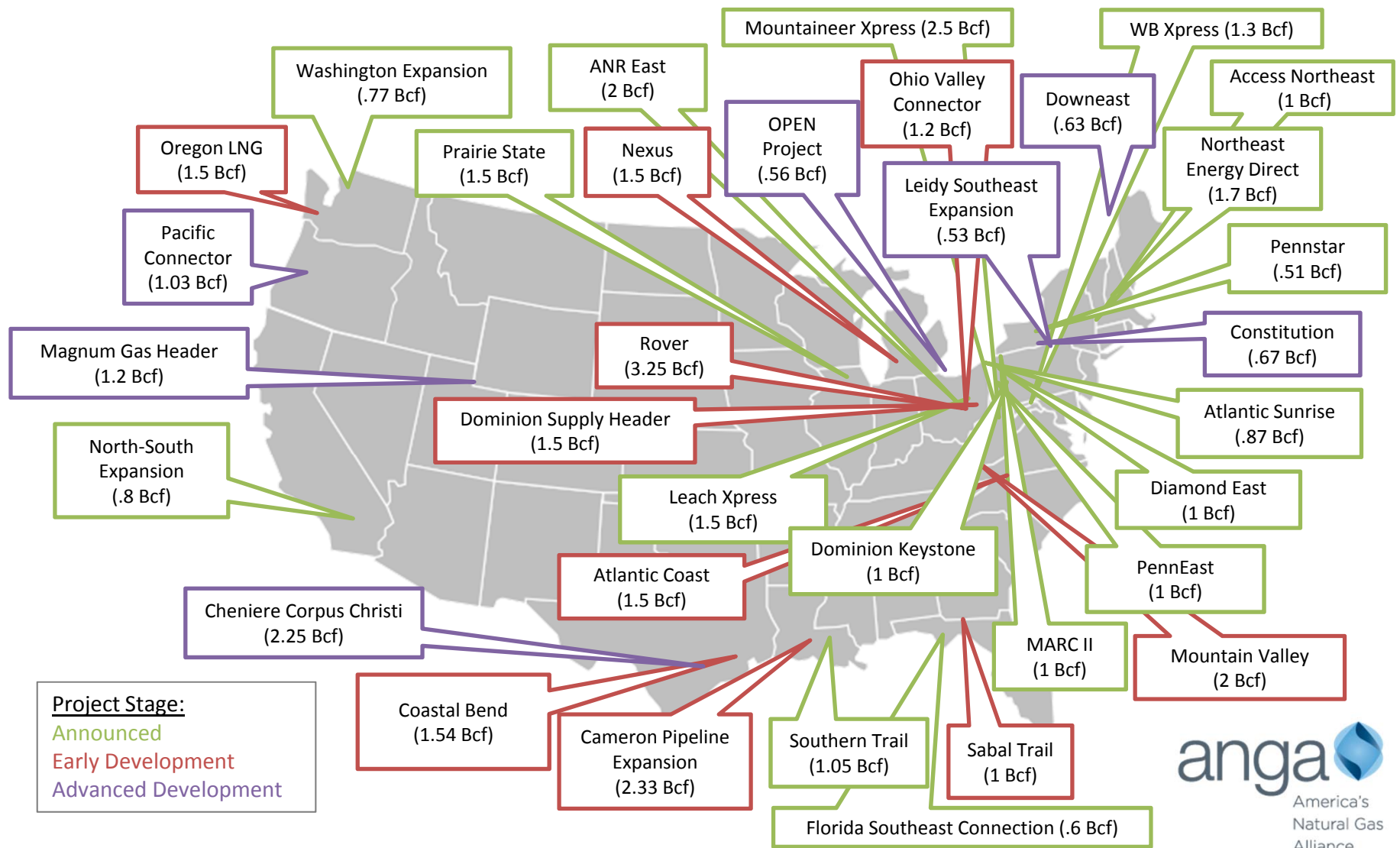


High Resource Reality Impact on Prices

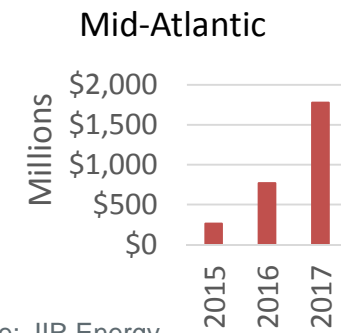
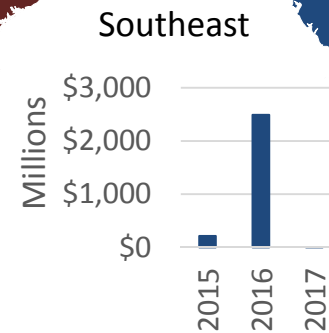
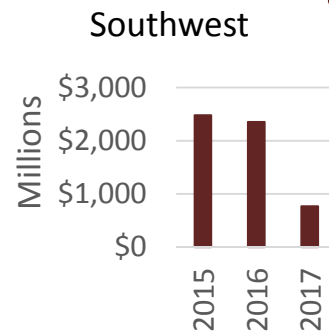
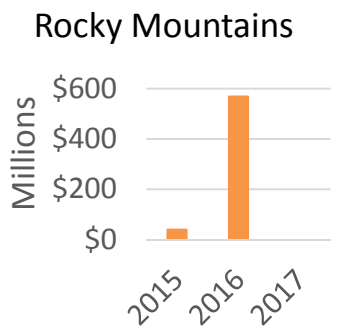
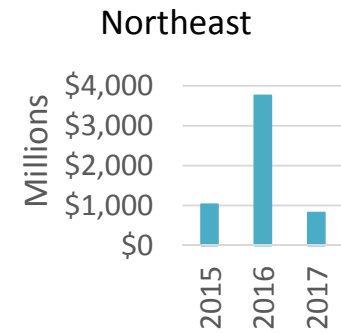
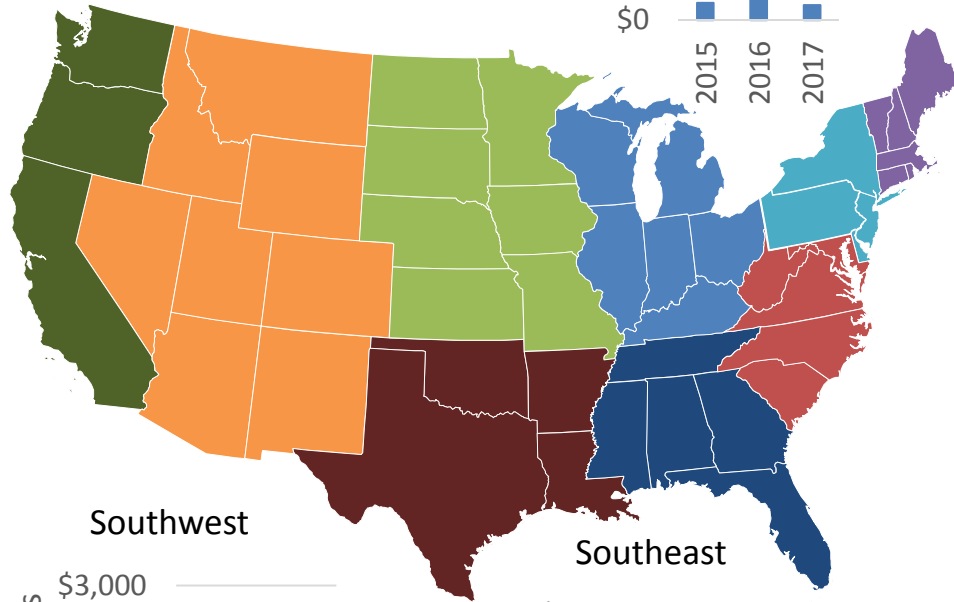
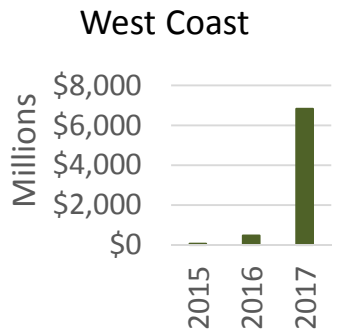
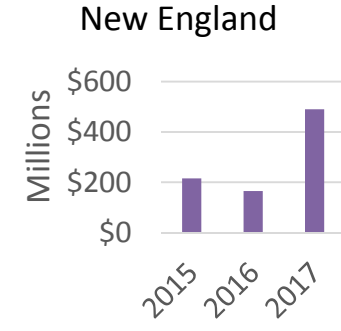
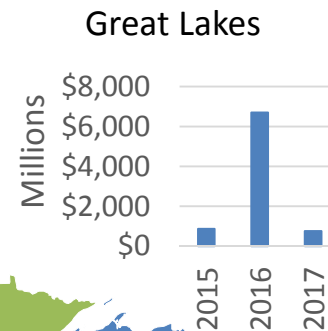
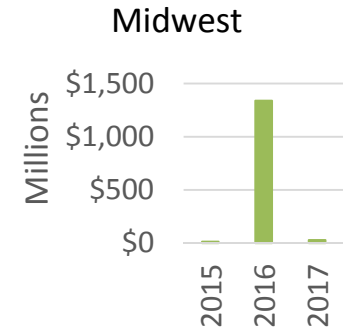
EIA: AEO 2015 & Clean Power Plan Analysis
Henry Hub Spot Price (\$/MMBtu)



Current Pipeline Projects (Lower 48 + >0.5 Bcf/d + >20 miles)

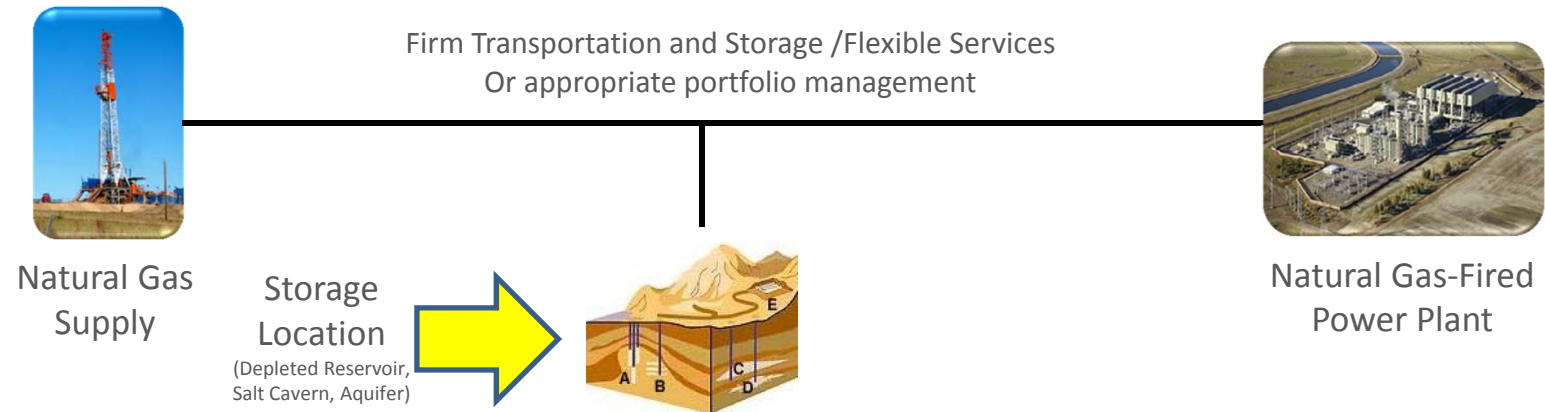


Regional Gas Infrastructure Investment



Source: IIR Energy

Reliable Delivery for Baseload Power



Natural gas combined cycle (NGCC) plants have a proven record of effectively and efficiently supplying baseload power to the electric power system. According to the EPA, over the last 15 years, 40% of currently operating NGCC plants in the U.S. have achieved at least one year in which their annual capacity factor was higher than 70%.



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