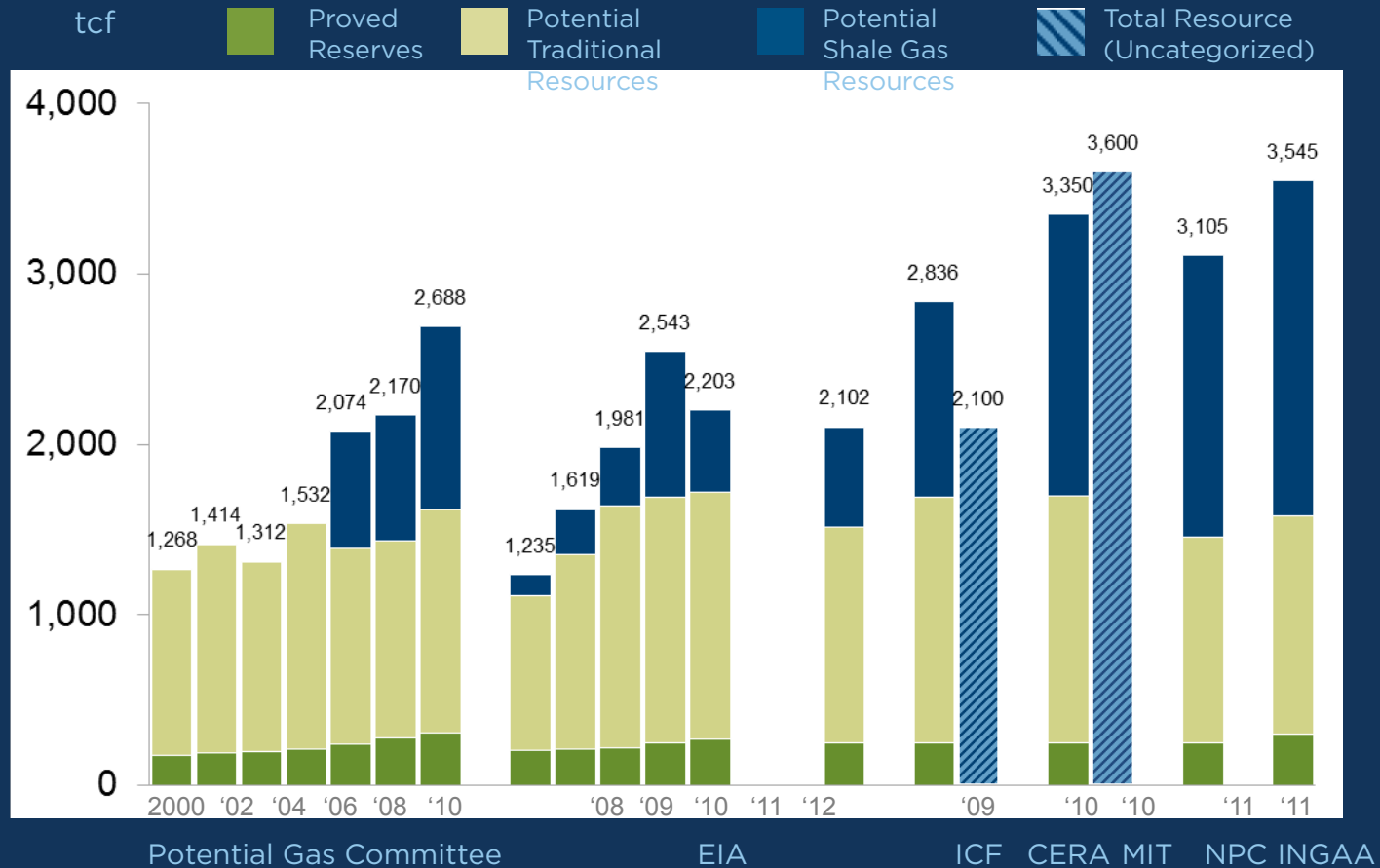


Natural Gas: Think About It

Marty Durbin
ANGA President & CEO

Abundant

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

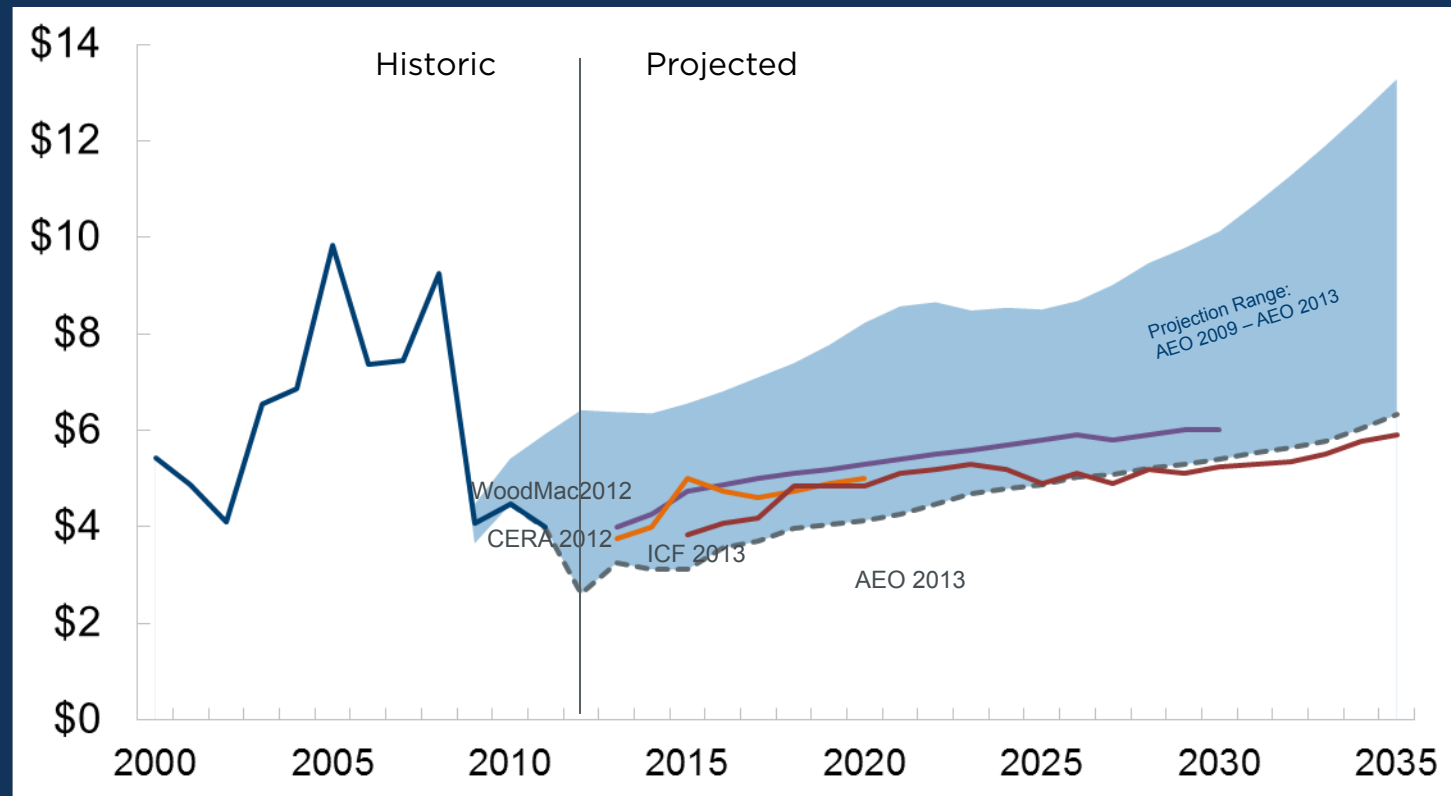


Sources: Potential Gas Committee, EIA, CERA, MIT, NPC, INGAA

Affordable

Henry Hub Spot Natural Gas Price (2011\$/ MMBtu)

2011\$/MMBtu



Source: EIA Annual Energy Outlook: 2009, 2010, 2011, 2012, 2013
Henry Hub Spot prices (Actual prices: 2000 to 2012)

Clean

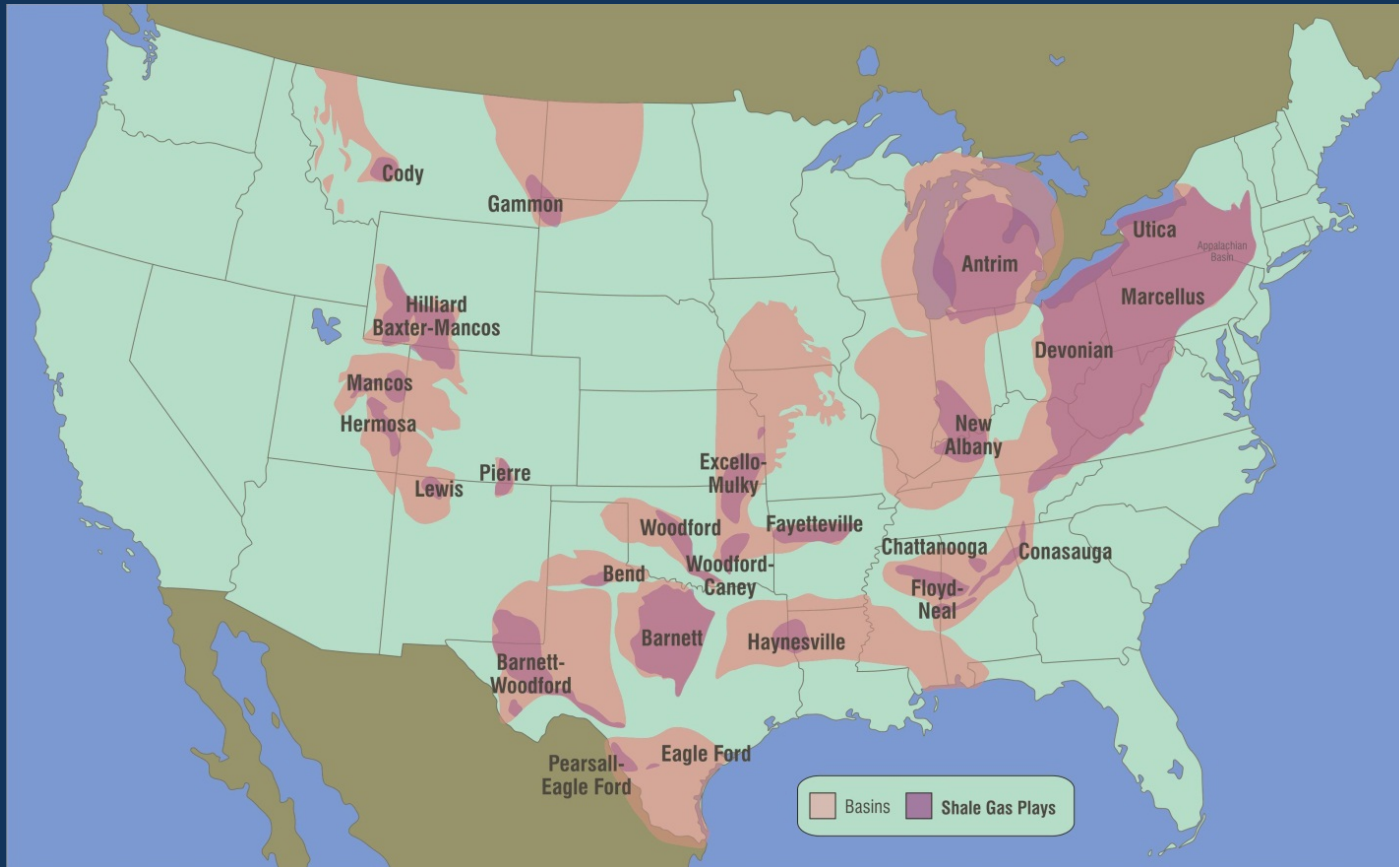
The Washington Post

AP IMPACT: CO2 emissions in US drop to 20-year low

August 16, 2012

"In a surprising turnaround, the amount of carbon dioxide being released into the atmosphere in the U.S. has fallen dramatically to its lowest level in 20 years."

U.S. Shale Gas Revolution



2012

1,073 TCF shale

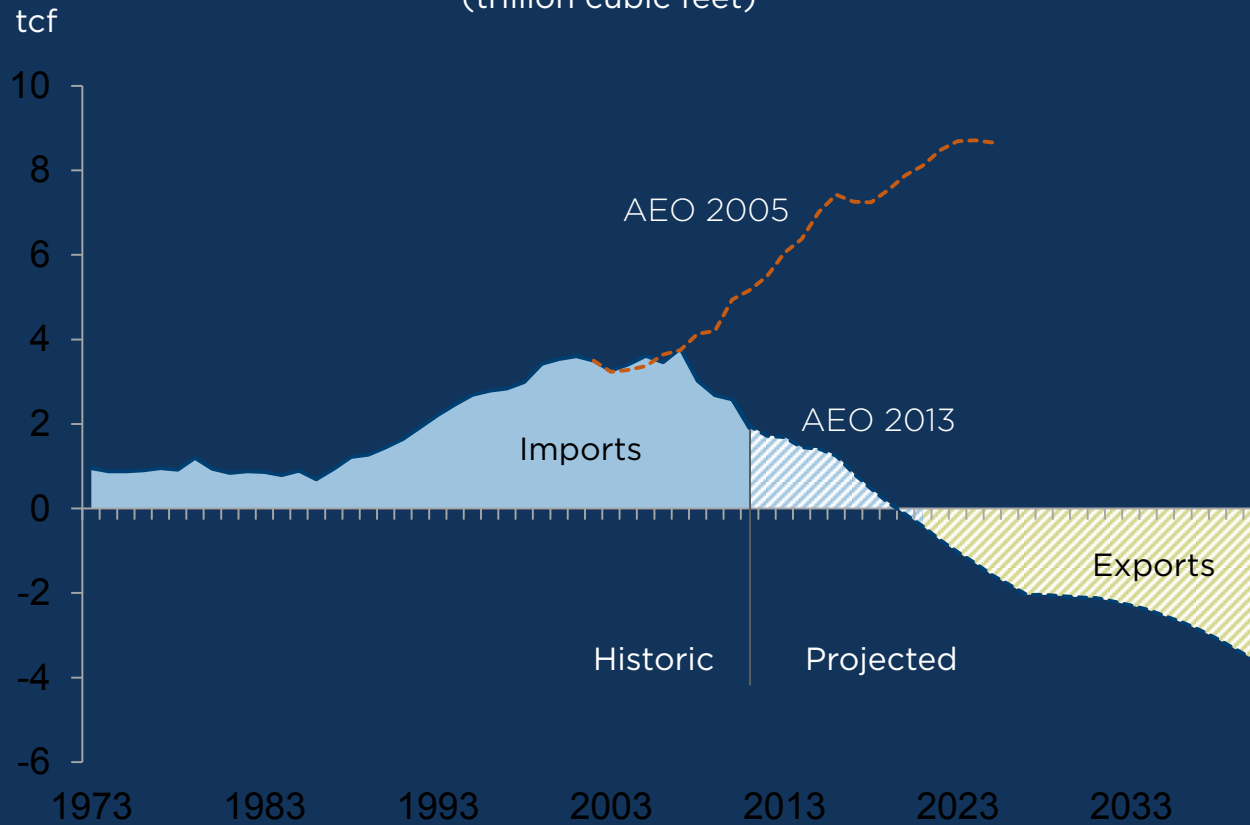
2,384 TCF total

26% INCREASE
in supply in just two
years

Source: Potential Gas
Committee

Game Change

Natural Gas Net Imports (trillion cubic feet)



Source: EIA, Annual Energy Outlook 2005 & 2013 Early Release



OPPORTUNITIES

An aerial night photograph of the New York City skyline, showing a dense cluster of illuminated skyscrapers. The word "POWER" is overlaid in large, white, bold, sans-serif capital letters in the center of the image. The Empire State Building is prominent on the right, and the Chrysler Building is visible on the left. The city lights create a warm, golden glow against the dark night sky.

POWER

Utilities Choosing Natural Gas

"Oregon officials back gas-fired power plant plans"

The Blade, 5/14/2013

"Pennsylvania DEP Approves First Marcellus Shale Gas Power Plant"

NGI's Shale Daily, 10/15/2012

"NAES Begins Operations At 150MW Dave Gates Gas-Fired Station In Montana"

Penn Energy, 7/8/2011

"EPA Rule Would Increase Gas Demand from Power 35 percent by 2014..."

Businesswire, 8/24/2011

"Natural gas-fired power plant planned in Robinson"

Pittsburgh Tribune-Review, 7/29/2011

"SemGroup building new natural gas processing plant"

Tulsa World, November 22, 2011

"MDU Plans Mandan Gas Plant "

Bismarck Tribune, 7/8/2011

"Dominion Virginia Power generation and conversion projects will produce more than \$3.3 billion in economic benefits by 2015..."

Associated Press, 8/15/2011

"Gas power plant planned"

Star Tribune, 4/4/2013

"Southern Union plans to build a \$235 million natural gas processing plant"

Houston Chronicle Fuelfix Blog, 8/23/2011

"NRG proposes natural gas power plant in Corpus Christi"

Corpus Christi Caller-Times, 3/26/2013

"Cheap natural gas changes generation dispatch in Southeast"

Electric Light and Power, 12/6/2012

"Florida approves TECO plan to create combined-cycle gas plant"

Reuters, 12/12/2012

A large industrial facility, possibly a refinery or chemical plant, is shown at night. The scene is illuminated by numerous bright lights, creating a high-contrast, blue-tinted environment. The facility features complex piping, scaffolding, and large storage tanks. The word "INDUSTRIAL" is overlaid in large, white, bold capital letters across the center of the image.

INDUSTRIAL

Industrial



Shale Gas: A renaissance in US manufacturing

December 2011

"...a potential increase of 1 million manufacturing jobs by 2025 and lower feedstock and energy costs."



A woman with dark hair, wearing a bright blue button-down shirt, is seated on a bus. She is looking out the window with a slight smile. The bus interior is visible, including the window frame and a handrail. Outside the window, a blurred image of a person in a blue shirt is visible, suggesting a reflection or a view through the glass. The word "NGVE" is overlaid in the center of the image in a bold, dark blue font.

NGVE

Driving Change

NGVs in fleets across America.

- 1 in 5 US transit buses run on natural gas
- Waste Management converting entire fleet
- CNG fire trucks and ambulances arriving
- Large corporate fleets reaping huge cost-savings (UPS, AT&T, Ryder)
- 22 governors pledging to purchase more natural gas vehicles for state fleets
- Marine, rail and drilling equipment can run cleaner, too.



EXPORTS



Exports



"We will probably be a net exporter of natural gas in somewhere between five and 10 years. And so the idea of the United States being energy independent — which seemed far-fetched as recently as 10 years ago — now is actually a possibility."

President Obama
New York
May 2013



SAFETY

Our Commitment

- Community Engagement
- Transparency
- Innovation
- Appropriate oversight



A man with short, light brown hair and a slight smile is standing outdoors. He is wearing a dark navy blue work jacket with two chest pockets, each with a zipper and a small red label. He is holding a bright yellow hard hat in his left hand. The background is blurred, showing industrial structures and greenery under a bright sky.

American Jobs

Consumer Savings

Thanks to abundant domestic natural gas, the average U.S. household's disposable income will save

- \$926 per year from 2012 to 2015.
- > \$2,000 by 2035.





AMERICA'S NATURAL GAS

thinkaboutit.org