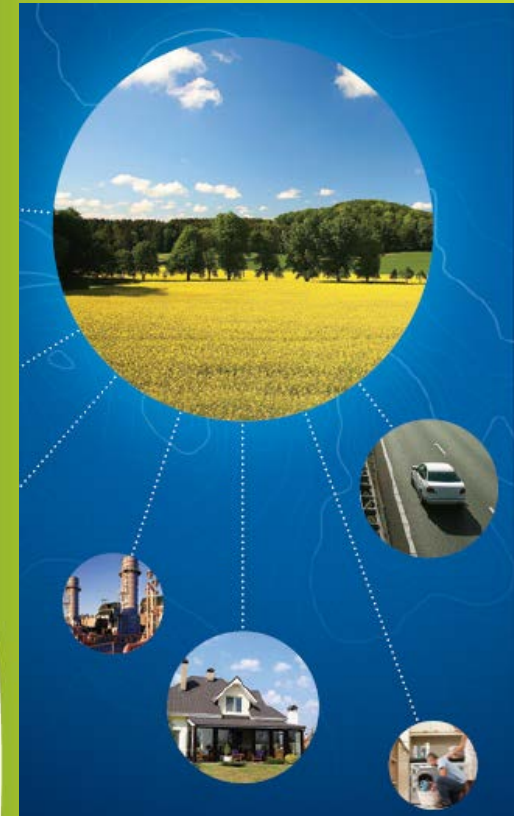
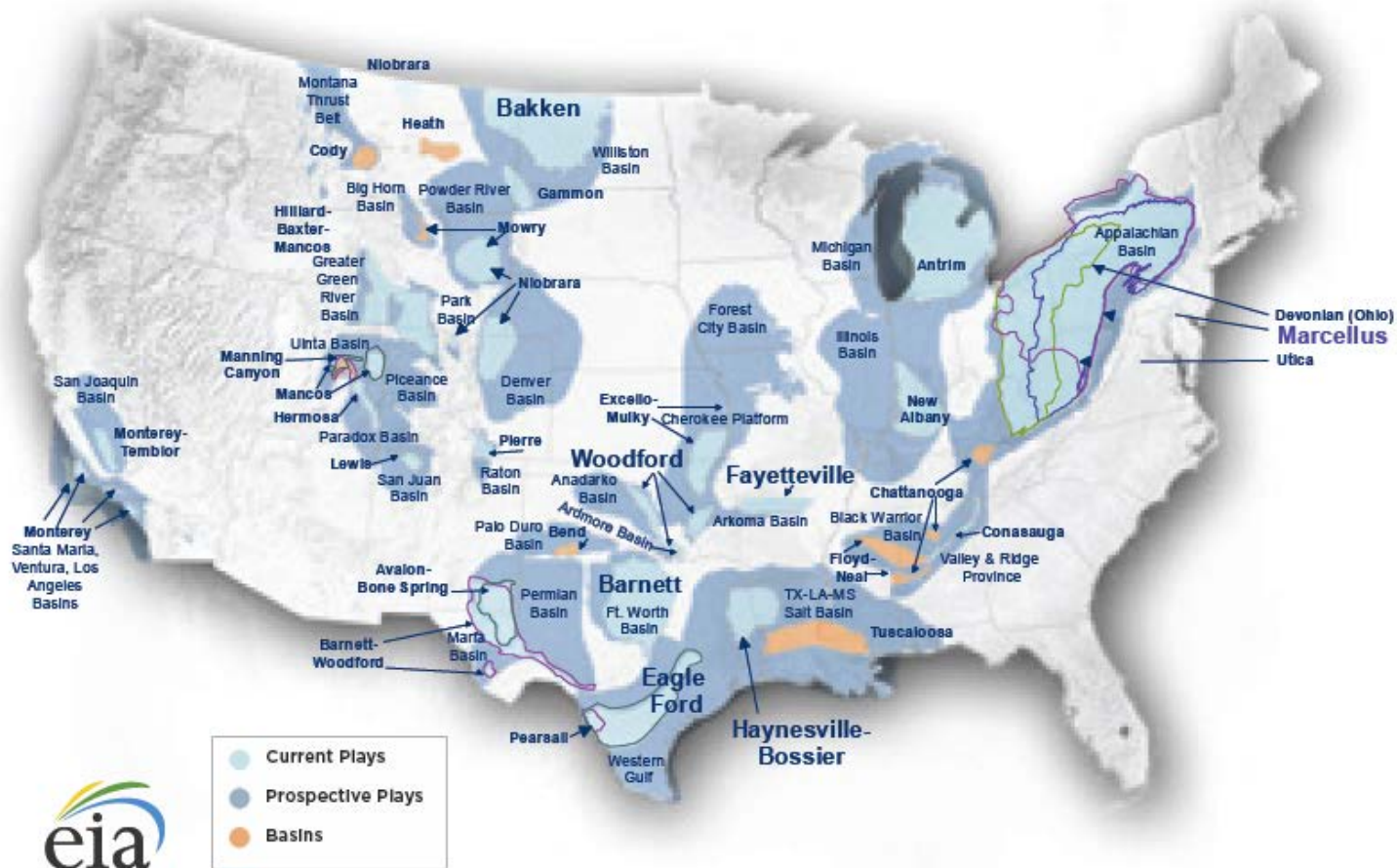


The Promise of Natural Gas

- America has seen a ***fundamental shift*** in the natural gas marketplace
- Technological advances, a newly accessible and abundant domestic resource, and an extensive delivery infrastructure make natural gas the ***foundation fuel*** for our economy
- This abundance of home-grown natural gas provides an opportunity to satisfy significant ***new demand*** at ***affordable prices*** well into the future



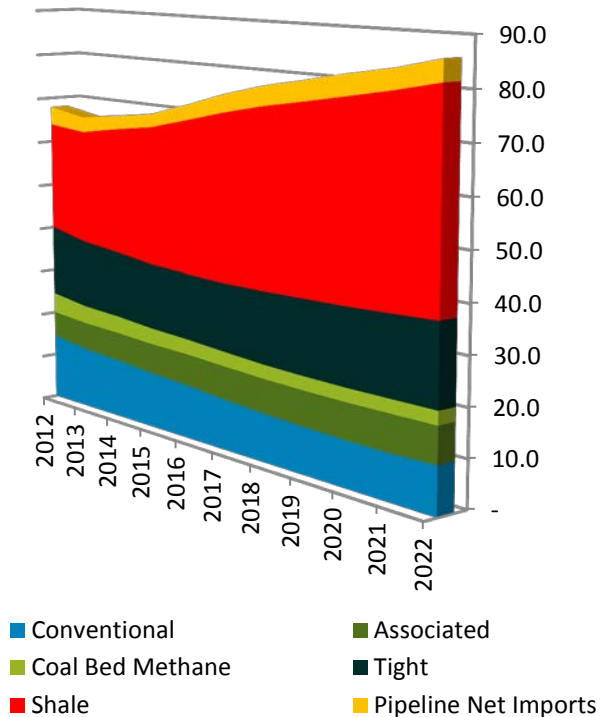
Domestic *Abundance*



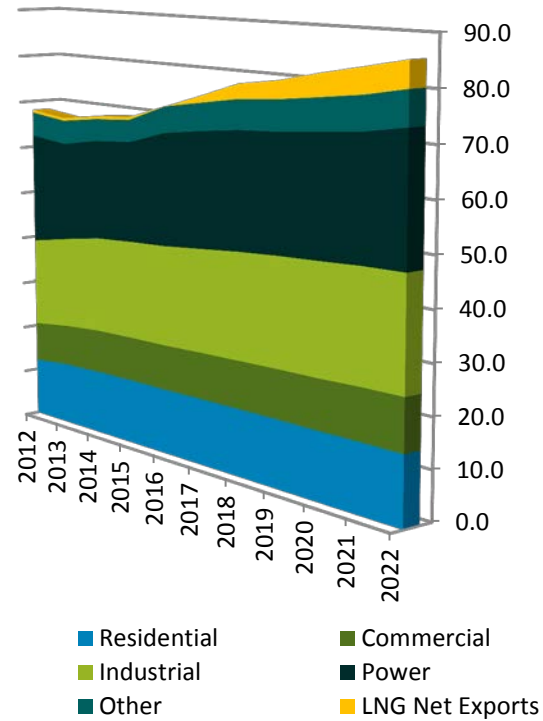
Source: Energy Information Administration based on data from various published studies.
 Updated: May 9, 2011

Supporting Increases in *Demand*

Natural Gas Supply



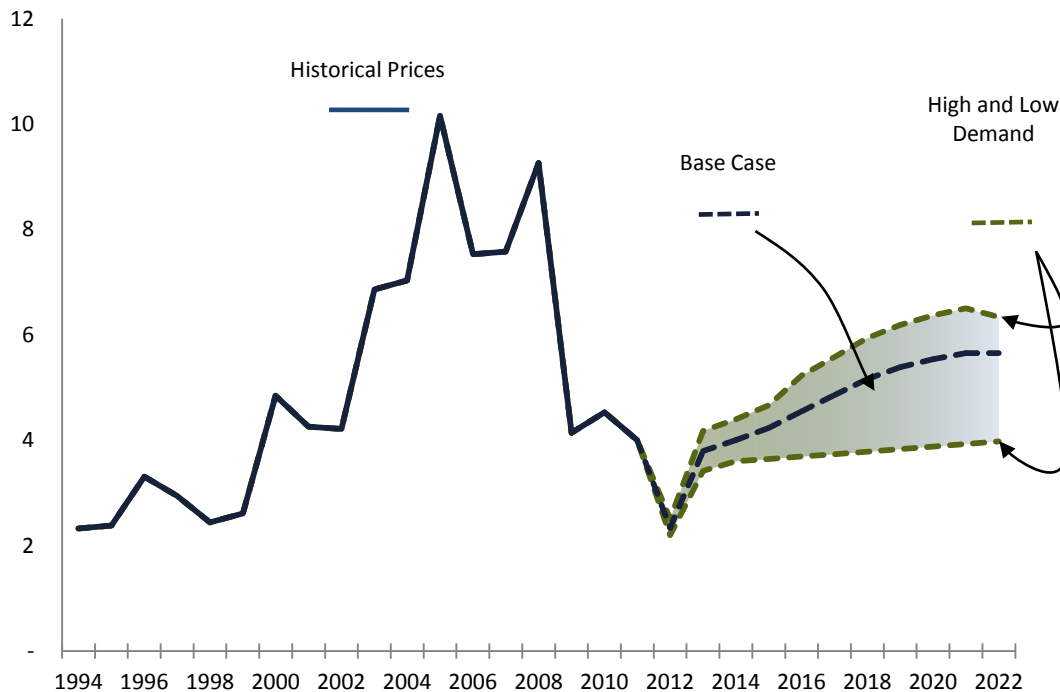
Natural Gas Use



(Billion Cubic Feet per Day)

A Future of *Market Stability*

Henry Hub Spot Price
\$2011/MMBtu



Relative natural gas market stability during the next ten years —an outlook that supports responsible resource development and reflects continued advancements in extraction and impacts technology

Source: *Rethinking Natural Gas, A Future for Natural Gas in the U.S. Economy*, p. 6, American Gas Association, © 2012, citing Source: Wood MacKenzie Spring 2012. See paper for outlook limitations.



Investing in our **Energy Future**

We can see greater benefits from natural gas if we



Promote the expansion of the natural gas delivery infrastructure and enhance the operation of the energy network to provide more information to customers



Deploy energy efficiency programs that fully leverage the efficient use of natural gas for space and water heating



Expand the use of combined heat and power in commercial and industrial applications to unlock the potential for fuel cells, micro-grids and future energy innovation using natural gas



Encourage public-private partnerships to expand the network of refueling options for natural gas vehicles