AN AMERICAN ENERGY REVOLUTION

ENERGY IN CHARTS

2016

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Our nation's economy continues to improve while America has become a world leader in energy production and in the reduction of greenhouse gas emissions, achievements long thought to be mutually exclusive. America's 21st century energy revolution is the result of industry-led innovations and entrepreneurial spirit, not government regulation and mandates. America's brighter energy reality benefits consumers and our economy by providing abundant, affordable and reliable energy and a cleaner environment. To continue America's positive energy, economic and environmental progress, we need to get our nation's energy policy right today.

HERE ARE THE FACTS...

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HOW TO STOP THE AMERICAN ENERGY REVOLUTION

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ENERGIZING AMERICA

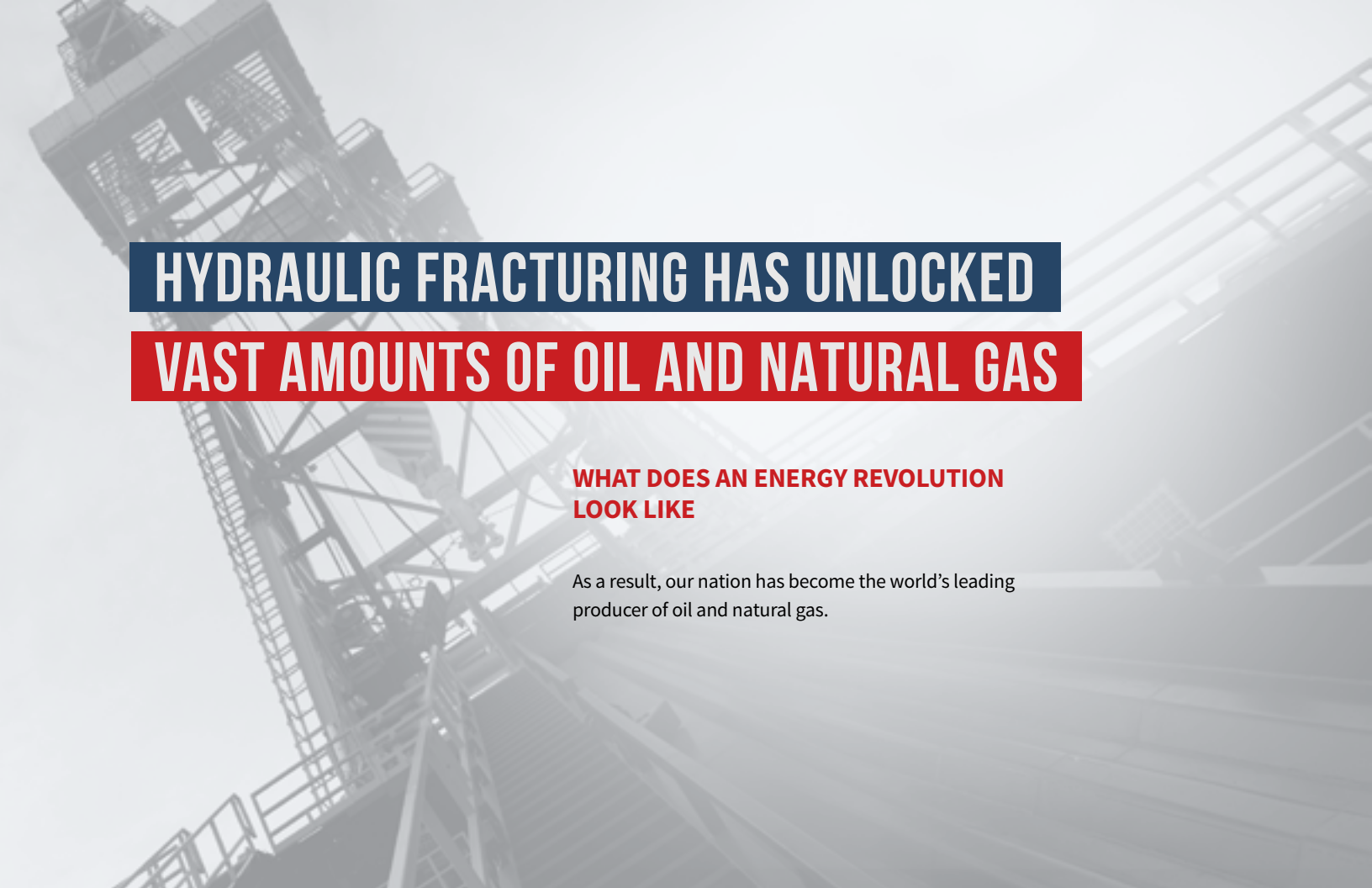
ENERGY IN CHARTS

WHAT DOES AN ENERGY REVOLUTION LOOK LIKE

Global Energy Leadership.

Affordable, Domestically-Produced Energy.

Enhanced National Security.



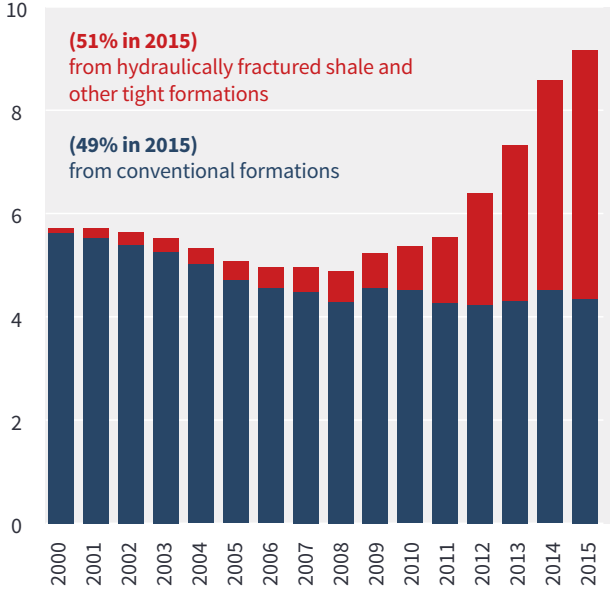
HYDRAULIC FRACTURING HAS UNLOCKED VAST AMOUNTS OF OIL AND NATURAL GAS

WHAT DOES AN ENERGY REVOLUTION LOOK LIKE

As a result, our nation has become the world's leading producer of oil and natural gas.

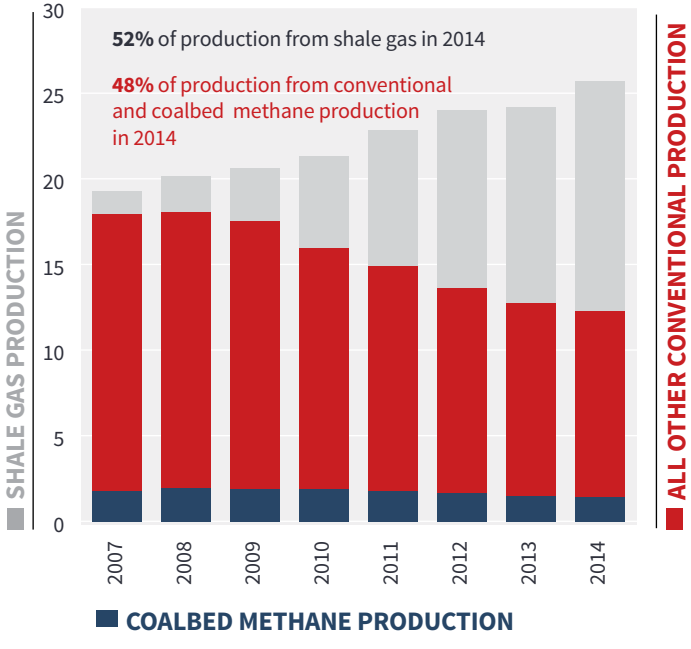
OIL PRODUCTION IN U.S. (2000-2015)

Million Barrels Per Day



U.S. DRY NATURAL GAS PRODUCTION

Trillion Cubic Feet



Note: Some Conventional Formations are Also Hydraulically Fractured to Increase Production.

Source: Today In Energy, March 15, 2016. EIA.

TODAY, THE U.S. IS THE WORLD'S LEADING PRODUCER OF OIL AND NATURAL GAS

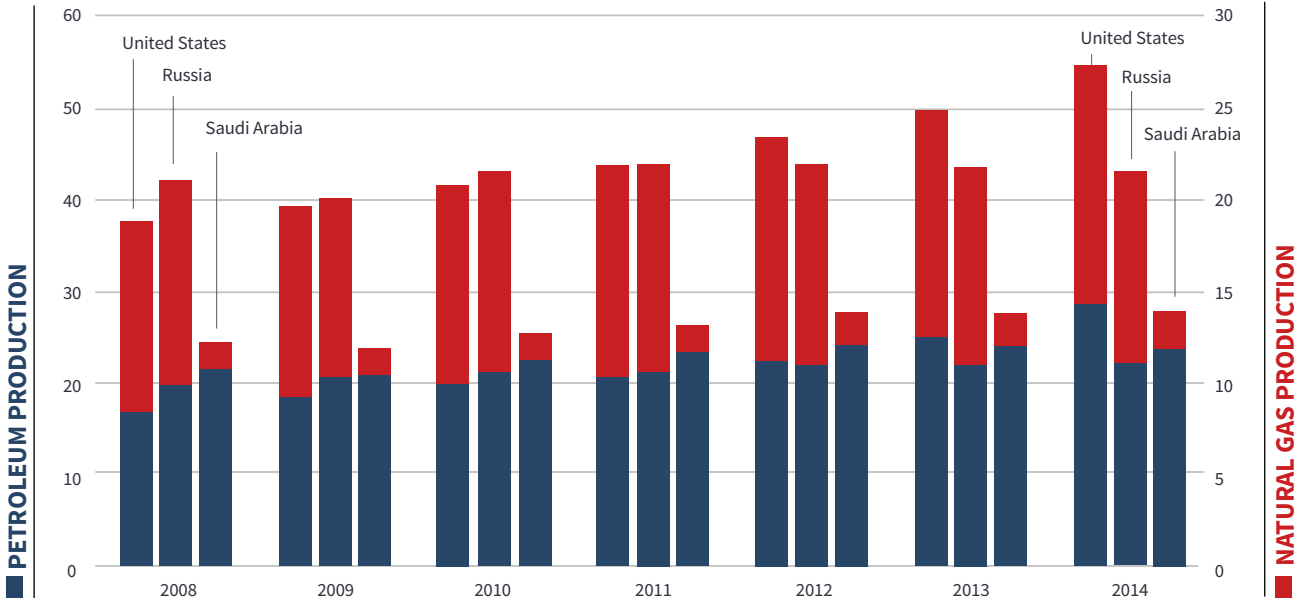
WHAT DOES AN ENERGY REVOLUTION LOOK LIKE

A dramatic change from just a few years ago.
More American energy benefits our nation's economy and consumers, and enhances our national security.

U.S., RUSSIA AND SAUDI ARABIA PETROLEUM AND NATURAL GAS PRODUCTION

Quadrillion British Thermal Units

Million Barrels Per Day of Oil Equivalent



Source: EIA, http://www.eia.gov/todayinenergy/detail.cfm?id=20692.

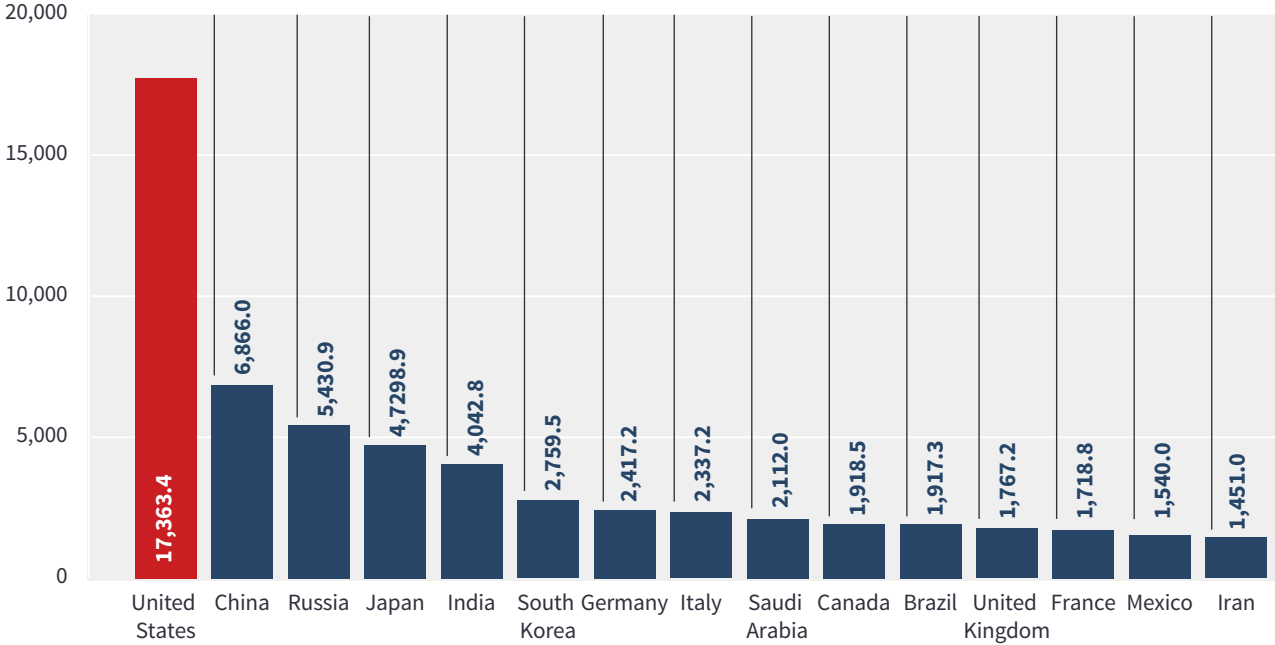
THE U.S. IS A WORLD LEADER IN CRUDE OIL REFINING

WHAT DOES AN ENERGY REVOLUTION LOOK LIKE

America also leads the world in refining capacity, supplied by our world-leading refineries, which provides the American consumer and the world with cleaner more efficient fuels.

CRUDE OIL DISTILLATION CAPACITY - 2012

Thousand Barrels Per Calender Day



Source: EIA, https://www.eia.gov/cfapps/ipdbproject/IEDIndex3.cfm?tid=5&pid=72&aid=7.

WHAT DOES THE AMERICAN ENERGY REVOLUTION MEAN

Energy Security.

Continued Environmental Progress.

Economic Growth and Opportunity.

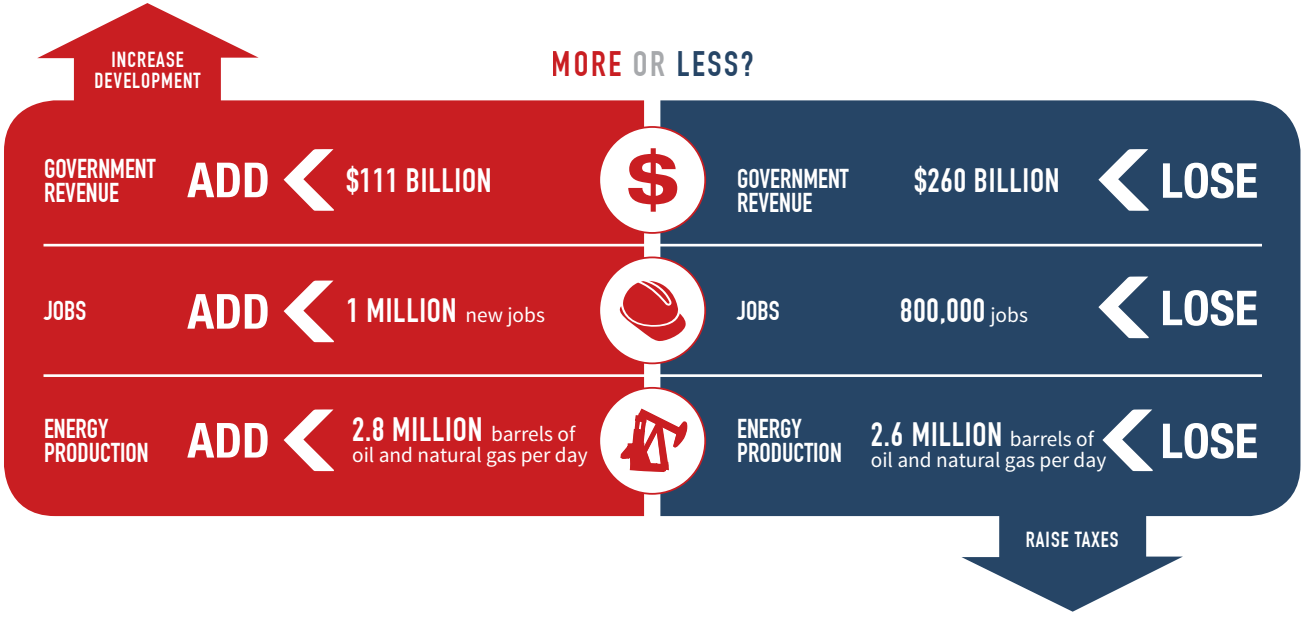
THE RIGHT ENERGY POLICY CHOICES COULD MEAN LONG-TERM U.S. ECONOMIC GROWTH, AND SUSTAINED GLOBAL ENERGY LEADERSHIP

WHAT DOES THE AMERICAN ENERGY REVOLUTION MEAN

The energy policy decisions our country makes today will determine America's energy future for generations to come.

IMPACTS OF POLICY CHOICES

Projected 2025 numbers



Source: Wood Mackenzie. A Comparison of US Oil and Natural Gas Policies.

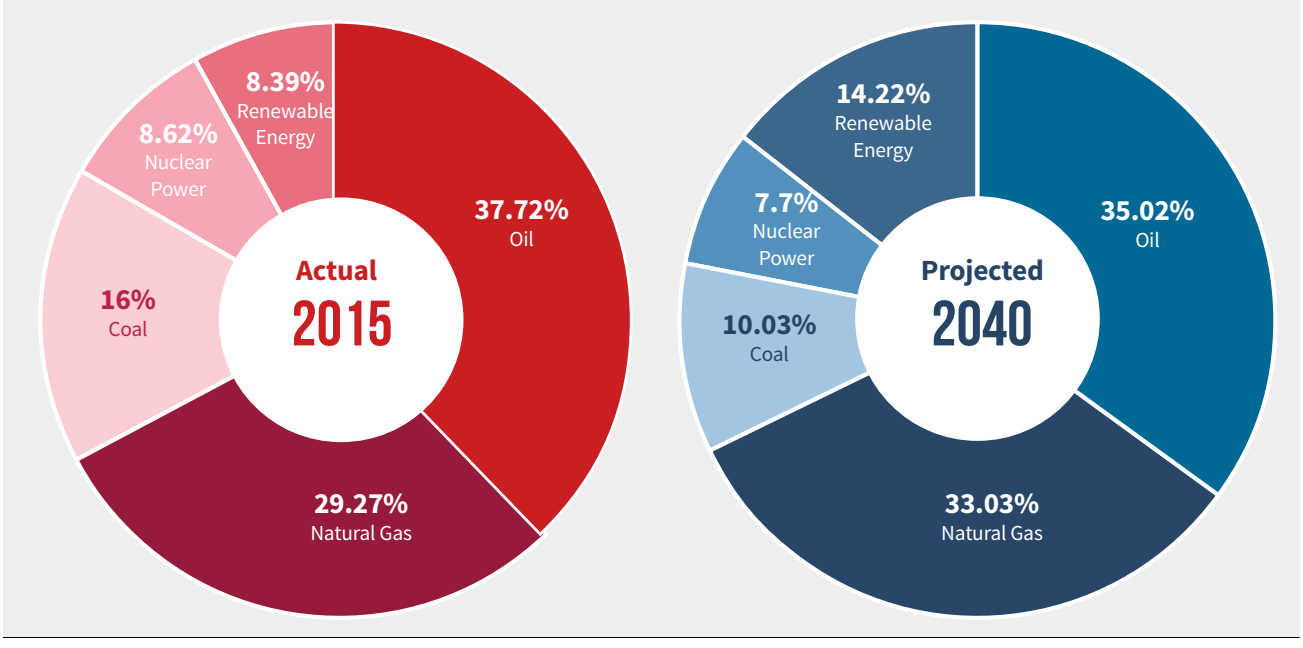
DEMAND FOR ENERGY FROM ALL SOURCES WILL CONTINUE TO GROW

WHAT DOES THE AMERICAN ENERGY REVOLUTION MEAN

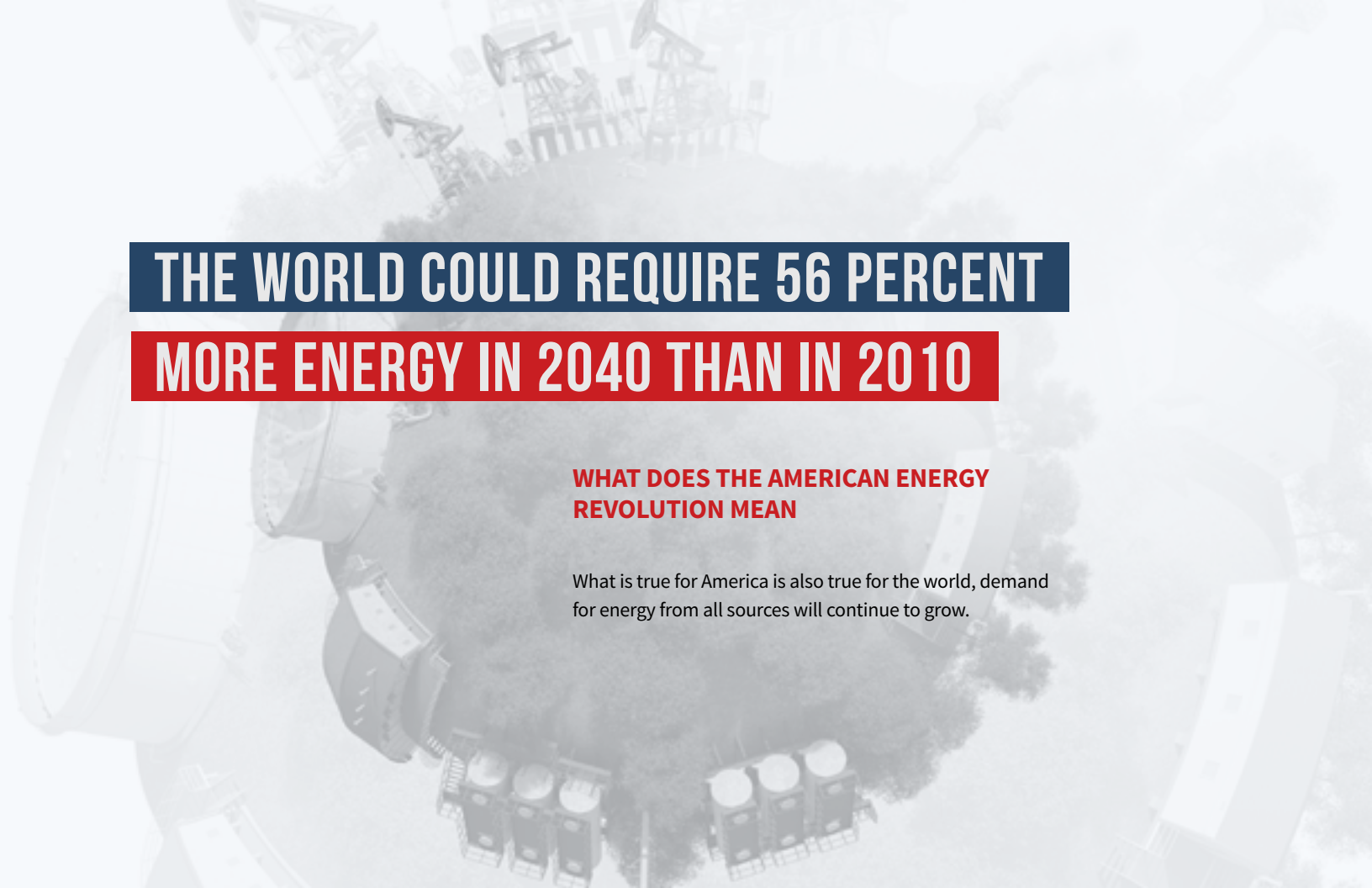
Today, oil and natural gas provide the bulk of America's energy; and government and private analysis agree they will continue to do so for decades come.

TOTAL ENERGY CONSUMPTION BY FUEL

2015-2040



Source: AEO 2016 Early Release, Total Energy Supply, Disposition, and Price Summary, May 2014.



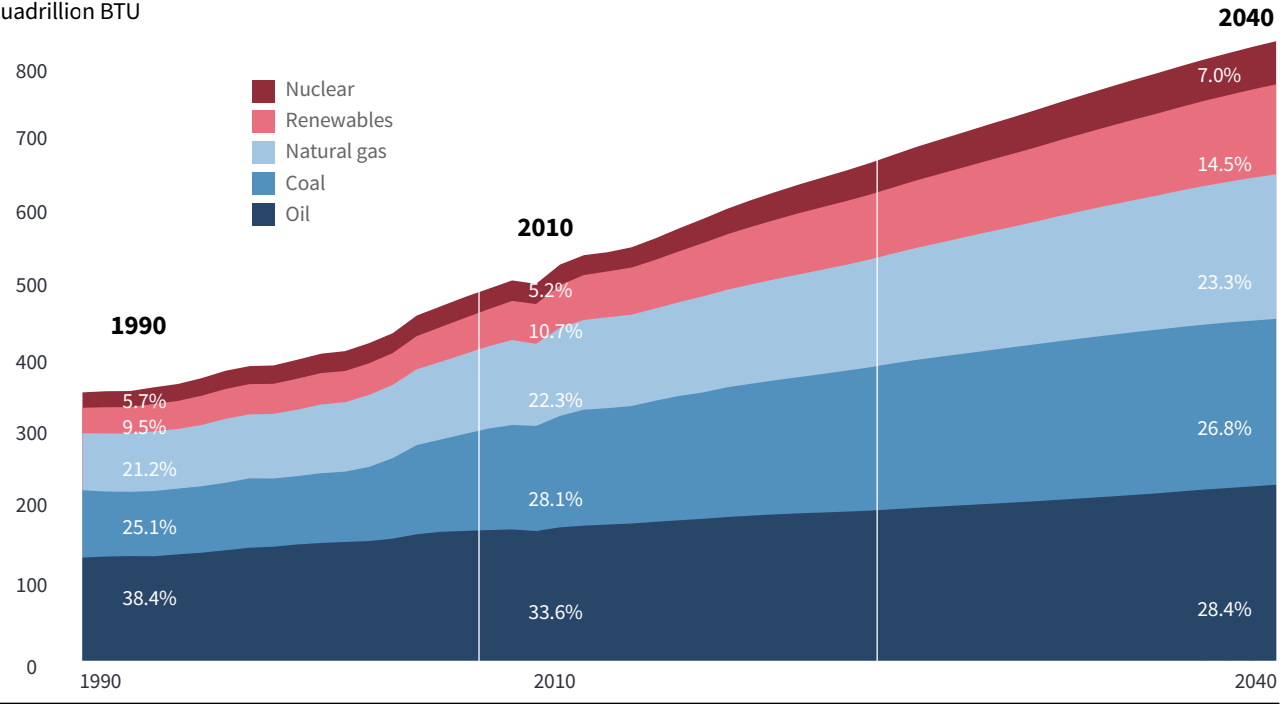
THE WORLD COULD REQUIRE 56 PERCENT MORE ENERGY IN 2040 THAN IN 2010

WHAT DOES THE AMERICAN ENERGY REVOLUTION MEAN

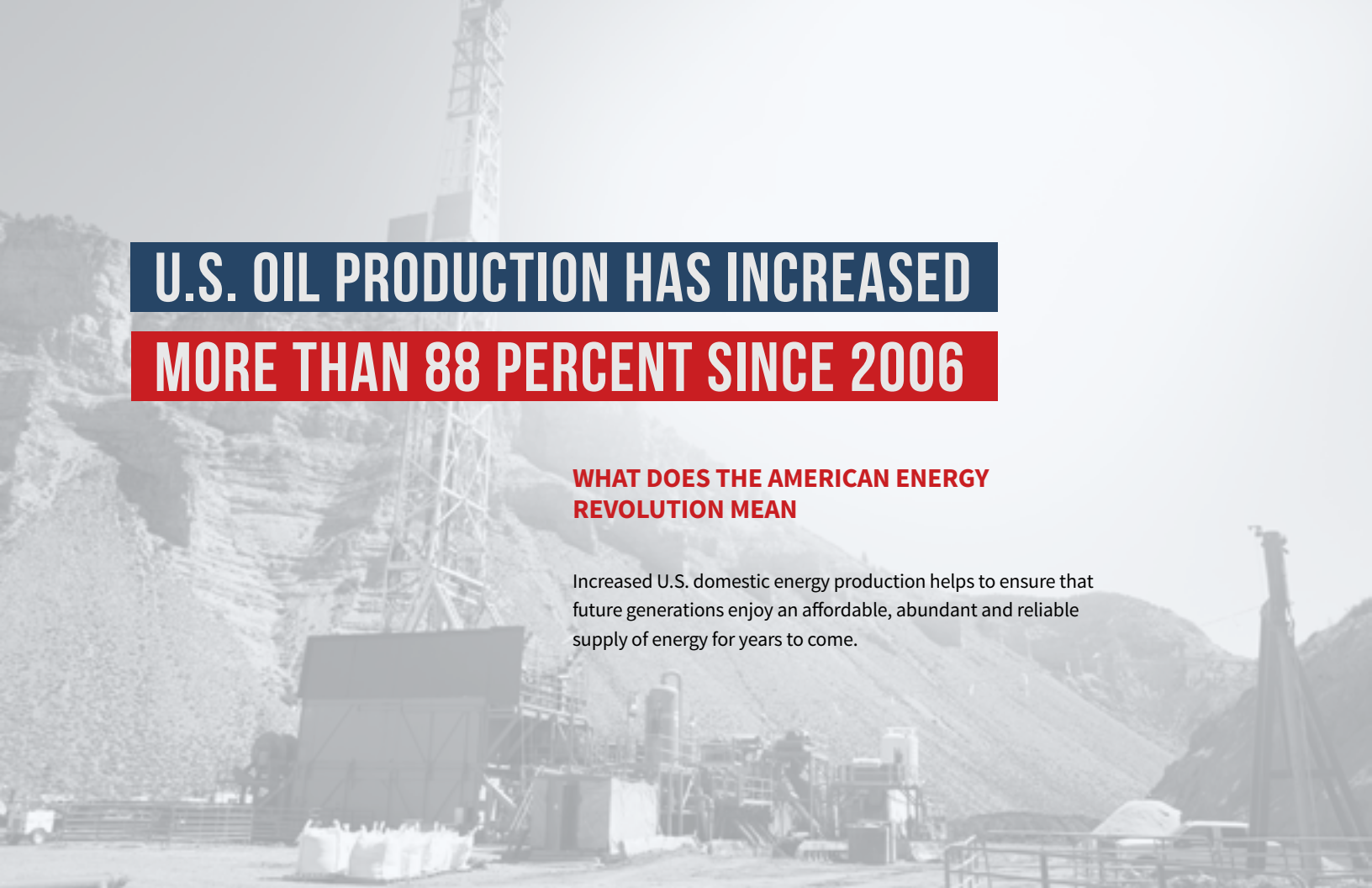
What is true for America is also true for the world, demand for energy from all sources will continue to grow.

FUTURE GLOBAL ENERGY DEMAND

Quadrillion BTU



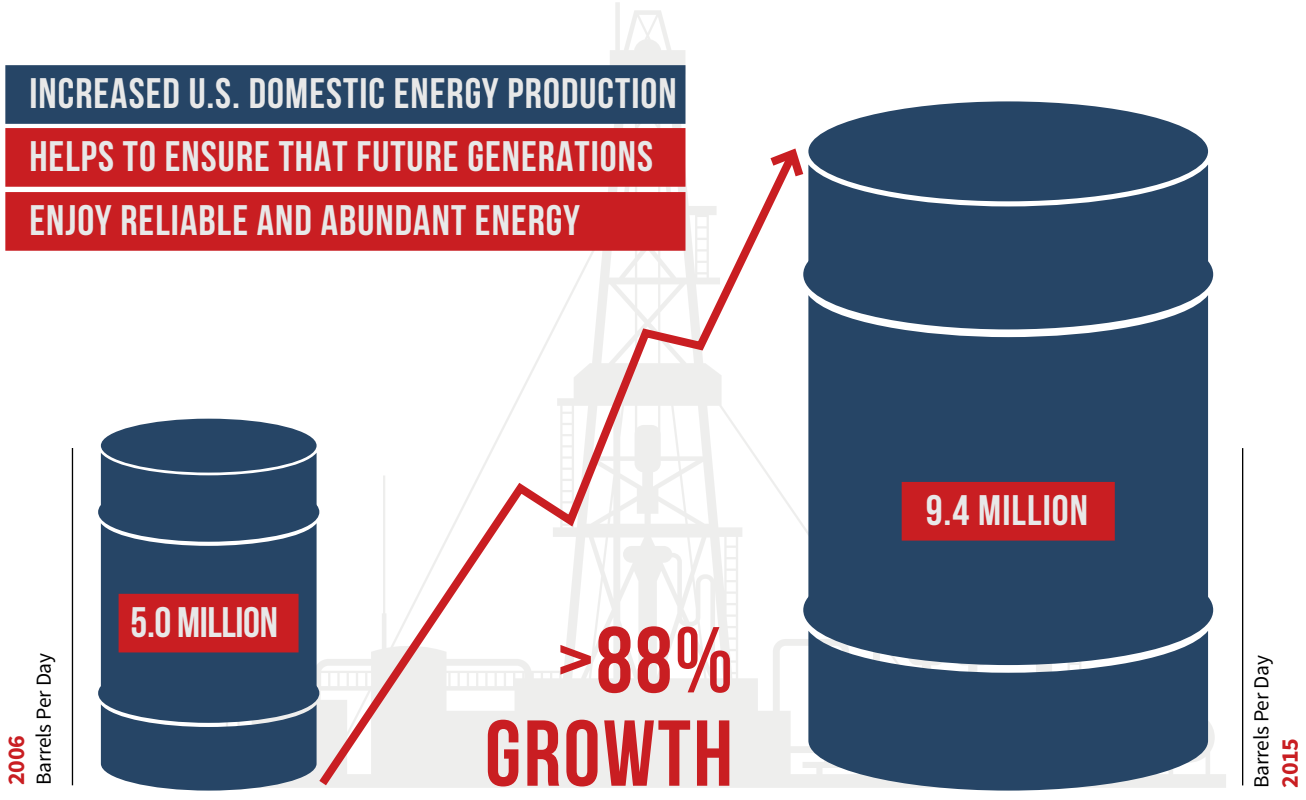
Source: EIA, International Energy Outlook 2015.



U.S. OIL PRODUCTION HAS INCREASED MORE THAN 88 PERCENT SINCE 2006

WHAT DOES THE AMERICAN ENERGY REVOLUTION MEAN

Increased U.S. domestic energy production helps to ensure that future generations enjoy an affordable, abundant and reliable supply of energy for years to come.


INCREASED U.S. DOMESTIC ENERGY PRODUCTION
HELPS TO ENSURE THAT FUTURE GENERATIONS
ENJOY RELIABLE AND ABUNDANT ENERGY
2006
Barrels Per Day
5.0 MILLION
>88%
GROWTH
9.4 MILLION
Barrels Per Day
2015

Source: EIA.

THE U.S. ENERGY REVOLUTION IS THANKS IN LARGE PART TO INDUSTRY INNOVATIONS

WHAT DOES THE AMERICAN ENERGY REVOLUTION MEAN

Today, the U.S. is more energy self-sufficient and has transitioned from an era of energy scarcity and dependence into a global energy leader.

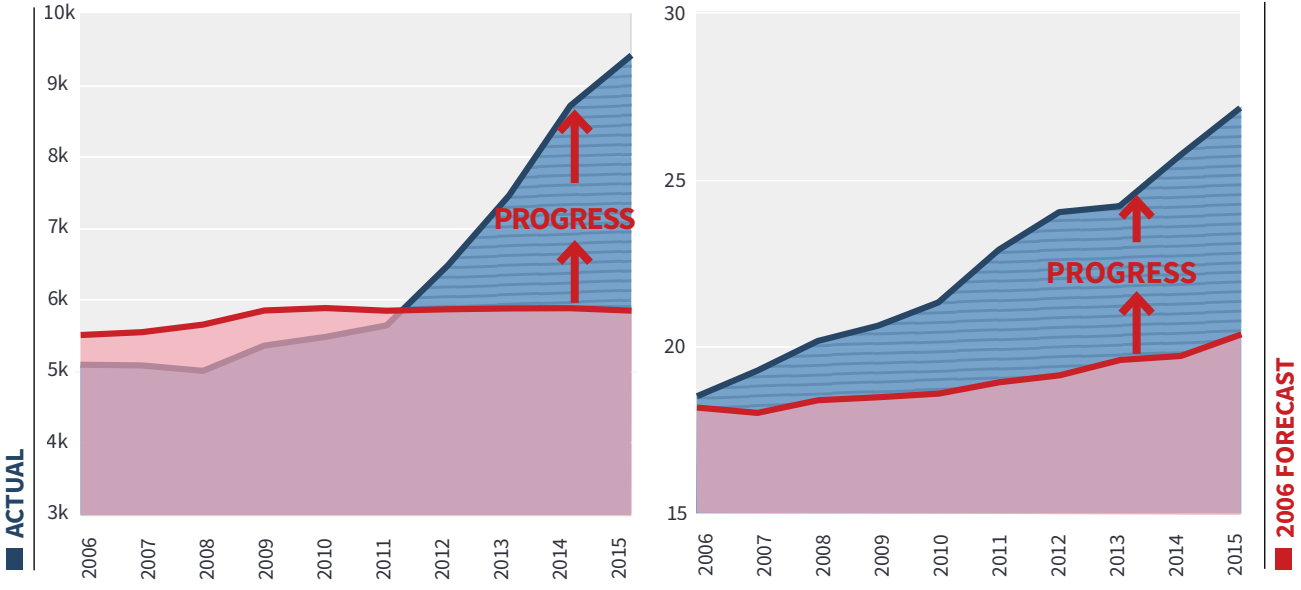
U.S. FIELD PRODUCTION OF CRUDE OIL

Million Barrels Per Day

U.S. DRY NATURAL GAS PRODUCTION

Trillion Cubic Feet

America's energy progress can be measured by the actual amount of energy we produce today versus the forecasts from a decade ago.



Source: EIA , AEO2006 - Table 14; January 2016 Monthly Energy Review.

INCREASED DOMESTIC OIL AND NATURAL GAS PRODUCTION MEANS A MORE ENERGY SECURE NATION

WHAT DOES THE AMERICAN ENERGY REVOLUTION MEAN

The U.S. energy revolution has increased the supply of domestically produced energy and lessened the need to import energy resources.

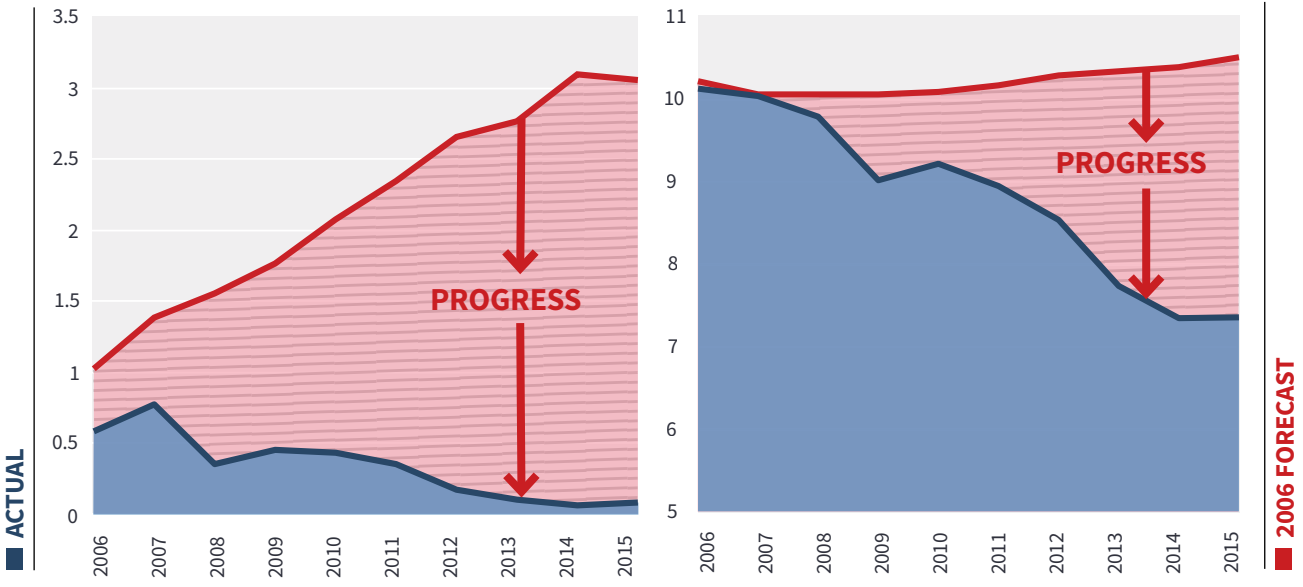
U.S. NATURAL GAS IMPORTS

Trillion Cubic Feet

U.S. CRUDE OIL IMPORTS

Million Barrels Per Day

America's energy progress can be measured by the actual amount of energy we import today versus the forecasts from a decade ago.



Source: EIA, AEO2006 - Table 13; EIA, AEO2006 - Table 11; January 2016 Monthly Energy Review.

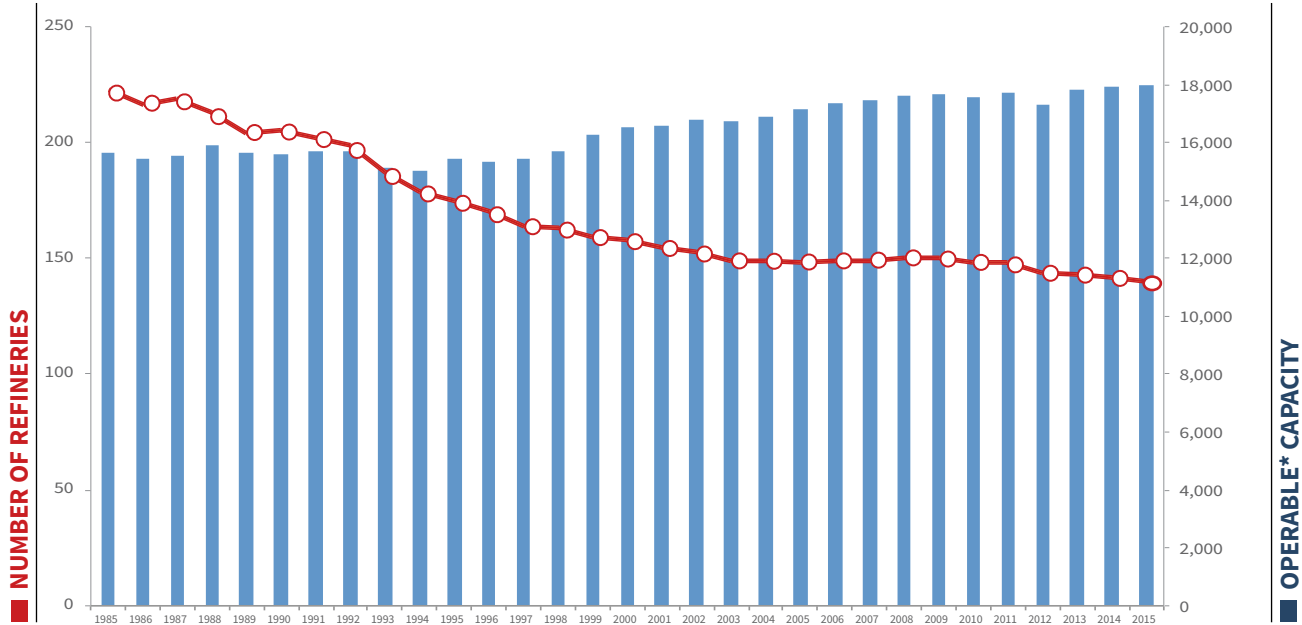
WORLD-LEADING INNOVATION CONTINUES TO INCREASE THE EFFICIENCY AND CAPACITY OF AMERICA'S REFINERIES

WHAT DOES THE AMERICAN ENERGY REVOLUTION MEAN

Refining capacity is crucial to our nation's economy and security. Our military depends on American refineries to provide secure, available fuels wherever and whenever they are needed. American refineries also supply the nation with clean and affordable fuels that are required to manufacture and produce hundreds of thousands of consumer products.

NUMBER OF REFINERIES DECLINES BUT CAPACITY EXPANDS

Thousands of Barrels Per Day



*Operable as of January 1st of each year.

Source: EIA, Petroleum Supply Annual and EIA, Annual Energy Review. http://www.eia.gov/petroleum/refinerycapacity/.


WHAT ABOUT THE ENVIRONMENT
Reduced Emissions.
Increased Production.
Increased Economic Growth.

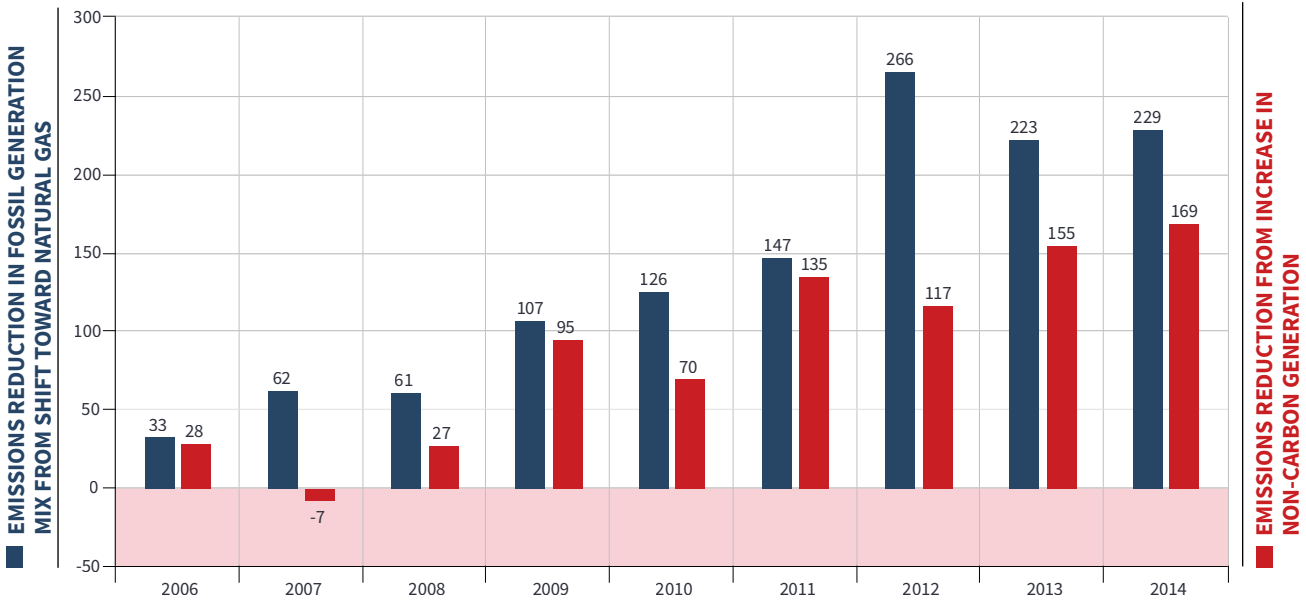
MORE U.S. ENERGY, LOWER U.S. EMISSIONS

WHAT ABOUT THE ENVIRONMENT

A fundamental shift to natural gas continues to reduce our nation's CO_2 emissions from electricity generation from 2006 – 2014.

ELECTRIC POWER SECTOR CO_2 REDUCTION

Million Metric Tons of CO_2



Source: EIA.

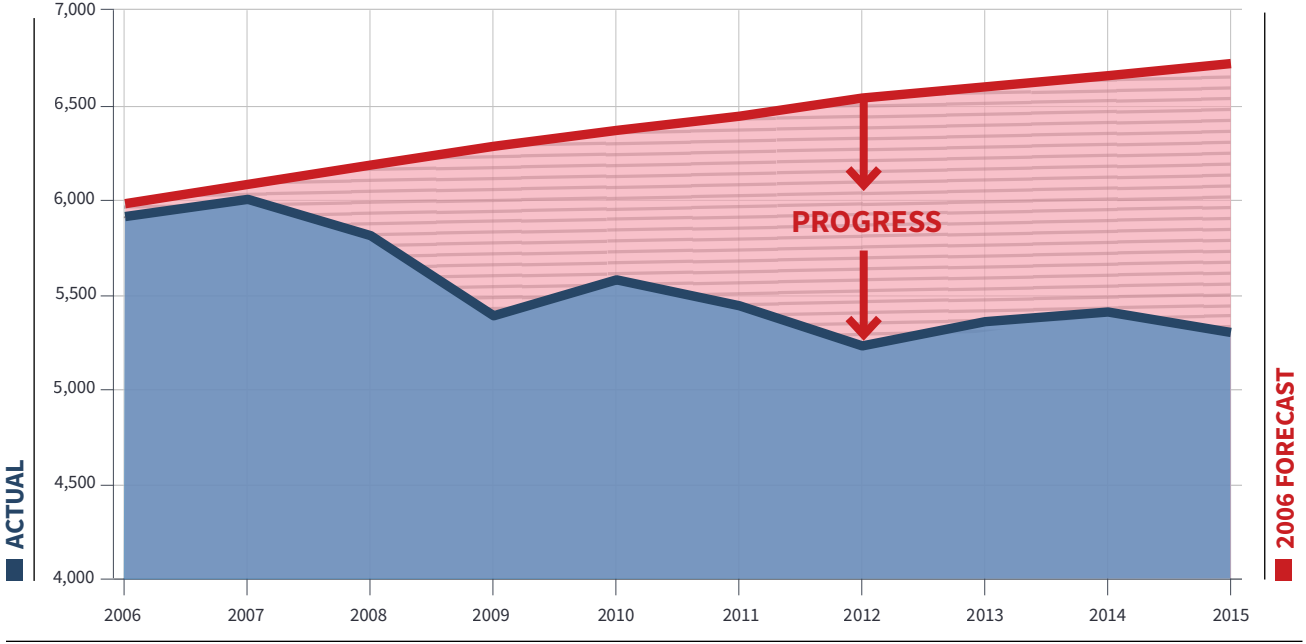
LOWER CO_2 EMISSIONS FROM ELECTRICITY GENERATION

WHAT ABOUT THE ENVIRONMENT

America's energy revolution has not only increased production and economic growth, but also helped decrease greenhouse gas emissions. Today, the U.S. is leading the world in energy production while it simultaneously leads the world in reductions of greenhouse gas emissions, an achievement that stands alone on the world stage.

U.S. LOWER CO_2 EMISSIONS

Emissions From Energy



Source: EIA, AEO2006 - Table 18; 2015, Feb 2016 STEO for 2015.

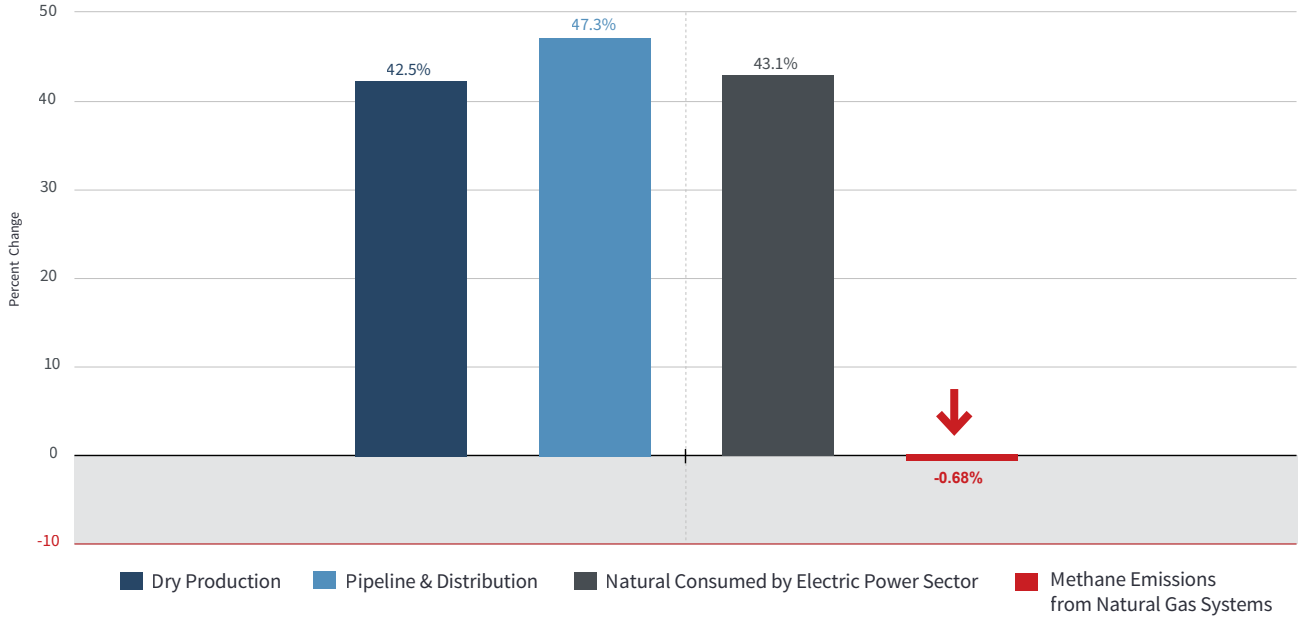
CLEANER BURNING NATURAL GAS LEADS TO LOWER EMISSIONS

WHAT ABOUT THE ENVIRONMENT

Our nation's abundant supply of domestically produced natural gas, driven by innovations in hydraulic fracturing and horizontal drilling, continues to drive down greenhouse gas emissions for the nation.

METHANE EMISSIONS FALLING WHILE PRODUCTION RISES

U.S. Natural Gas 2005 to 2014



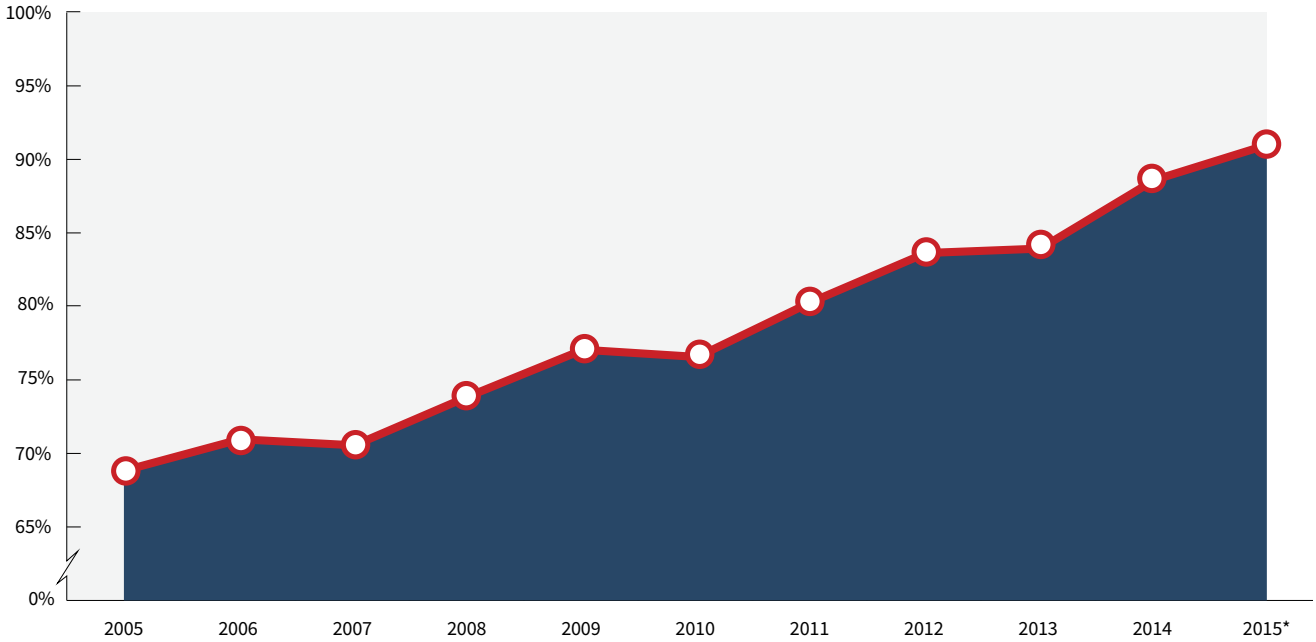
Source: EPA, Emissions and Production Data.

THE U.S. ENERGY REVOLUTION HAS MADE OUR NATION MORE ENERGY SECURE

WHAT ABOUT THE ENVIRONMENT

The vast majority of the energy we consume is produced right here in North America by the world's most efficient and advanced refineries.

U.S. ENERGY PRODUCTION AS PERCENTAGE OF CONSUMPTION



* Data through November 2015.

Source: EIA , February 2016. Monthly Energy Review, Table 1.1.

HOW TO STOP THE AMERICAN ENERGY REVOLUTION

Substitute Government Mandates for Economic and Market Realities.

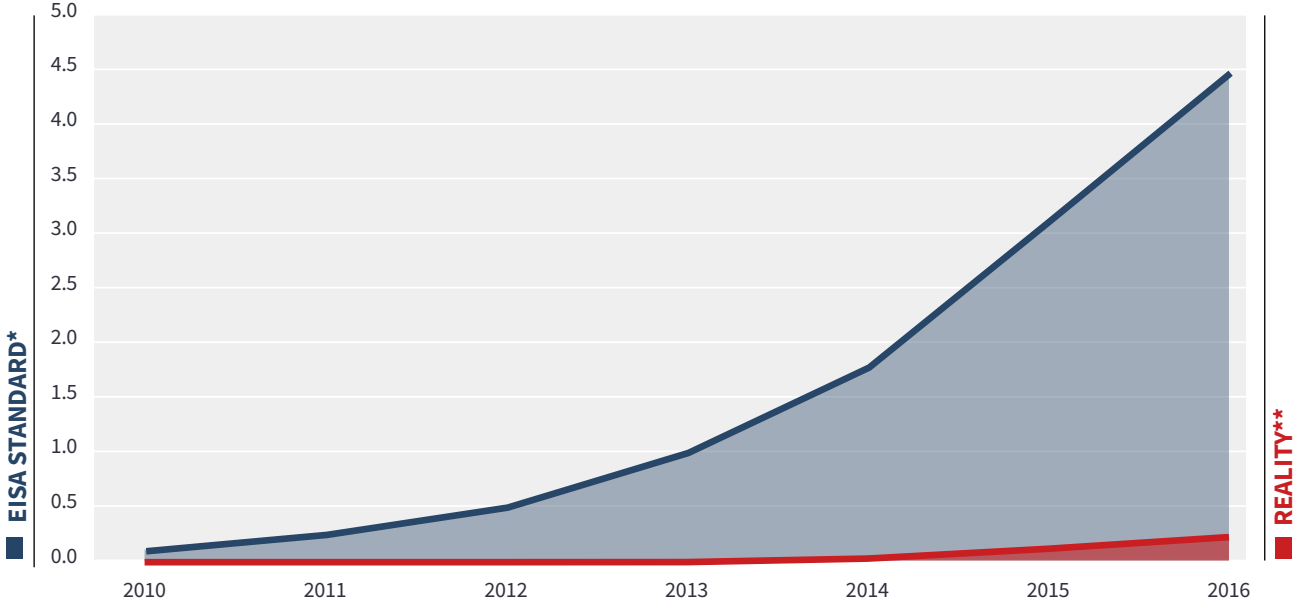
THE RENEWABLE FUEL STANDARD IS A FAILED POLICY THAT ENDANGERS CONSUMERS

HOW TO STOP THE AMERICAN ENERGY REVOLUTION

The RFS should be repealed or significantly reformed. Its artificial mandates are based on consumption forecasts that are much different from market reality.

EISA CELLULOSIC VOLUMES EXCEED REALITY

Billions of Gallons



Source: Energy Independence and Security Act of 2007. EPA EMTS data and 2016 Final Rule.
https://www.epa.gov/renewable-fuel-standard-program.

*Applicable volume of cellulosic biofuel (in billions of gallons); ** Cellulosic RINs (billions).

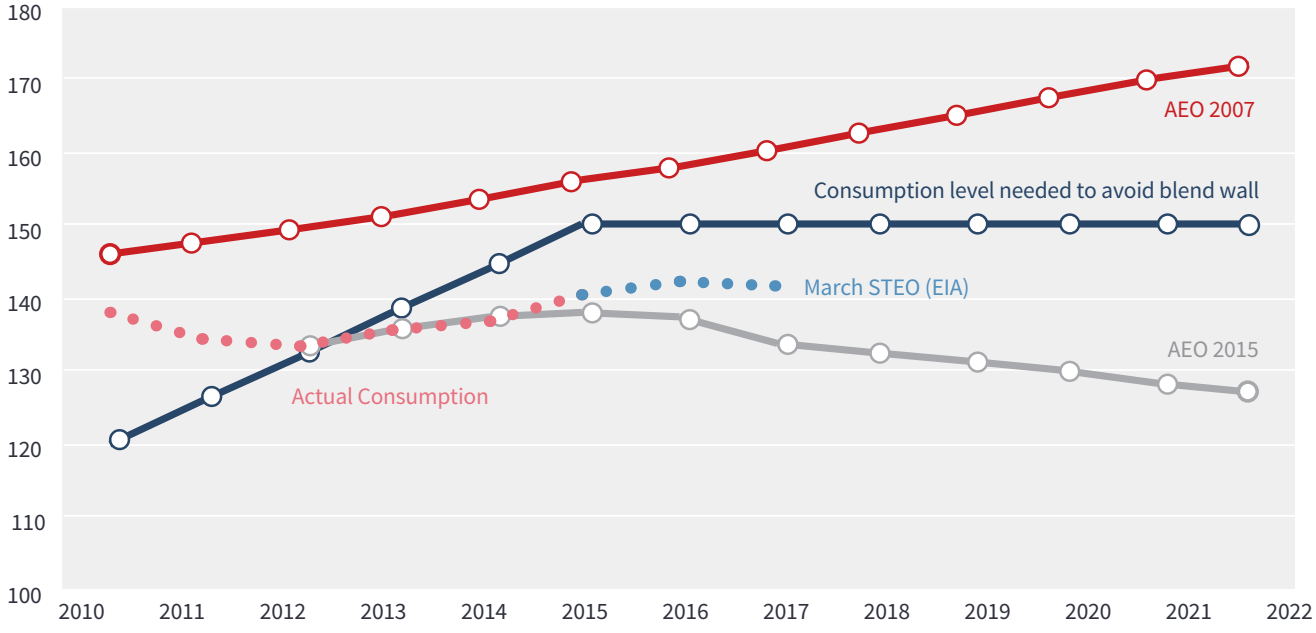
THE RENEWABLE FUEL STANDARD IS A DANGEROUS RELIC OF OUR NATION'S ENERGY PAST

HOW TO STOP THE AMERICAN ENERGY REVOLUTION

The Renewable Fuel Standard's disconnect with market reality could send our nation into the blend wall, which could cost consumers millions of dollars in unexpected engine repair costs.

MARKET REALITY VS. RFS MANDATES

Billions of Gallons



Source: EIA and EISA.

E85 NOT A SOLUTION TO THE BLEND WALL

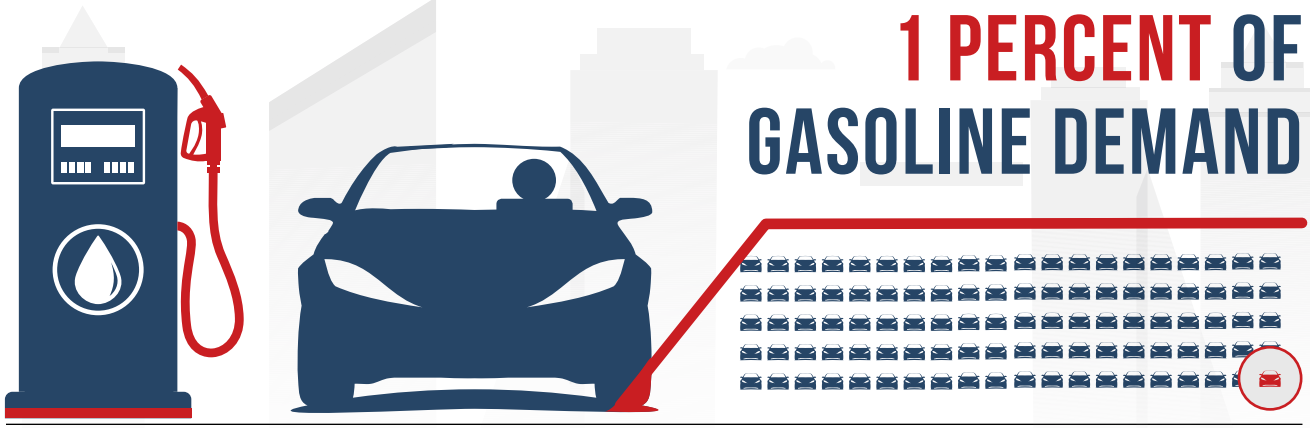
HOW TO STOP THE AMERICAN ENERGY REVOLUTION

Biofuels have an important role to play in meeting the fuel needs of America's consumers. Our nation's world-class refiners will continue to use biofuels due to their valuable blending properties with or without the RFS mandate. Unfortunately the continued implementation of biofuel mandates untethered from market reality or consumer demand poses a significant potential risk to consumers through engine repair costs.

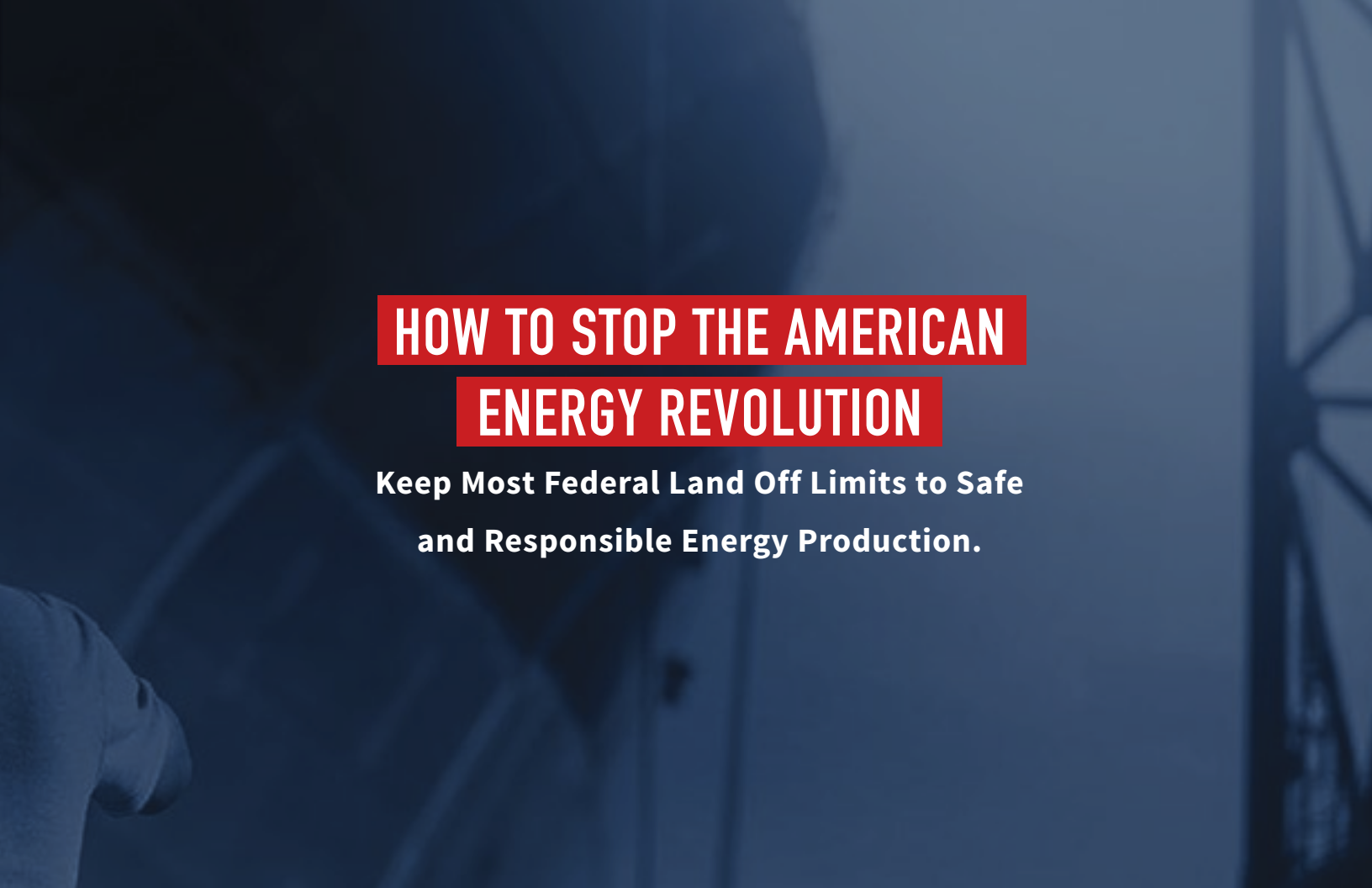
E85 NOT A SOLUTION TO BLEND WALL

Annual Gasoline Demand

ACCORDING TO THE EIA THE ANNUAL AMOUNT OF E85 SOLD IN 2015 IS LESS THAN ONE PERCENT OF ANNUAL GASOLINE DEMAND.



Source: U.S. Department of Energy.



HOW TO STOP THE AMERICAN ENERGY REVOLUTION

Keep Most Federal Land Off Limits to Safe and Responsible Energy Production.

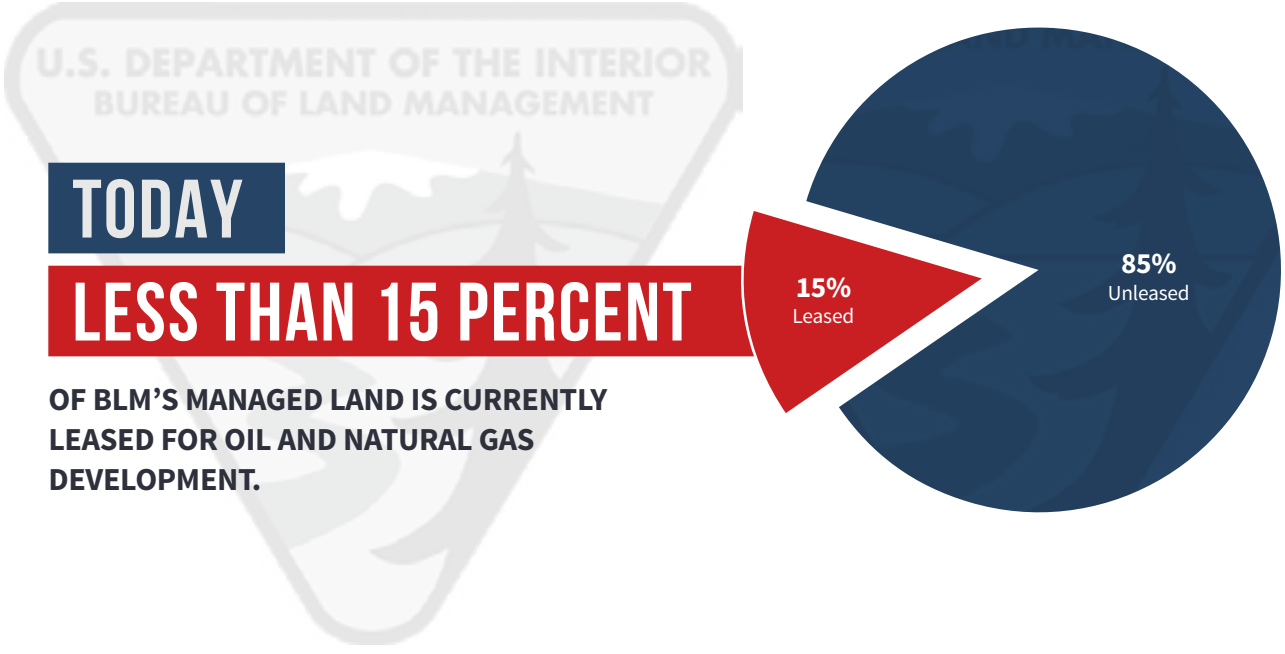
AMERICAN ONSHORE ENERGY RESOURCES

OFF LIMITS

HOW TO STOP THE AMERICAN ENERGY REVOLUTION

The U.S. energy revolution is unnecessarily constrained by limited access to energy resources on the vast majority of land under federal jurisdiction.

MOST ONSHORE AMERICAN ENERGY RESOURCES ARE OFF LIMITS



Source: Bureau of Land Management.

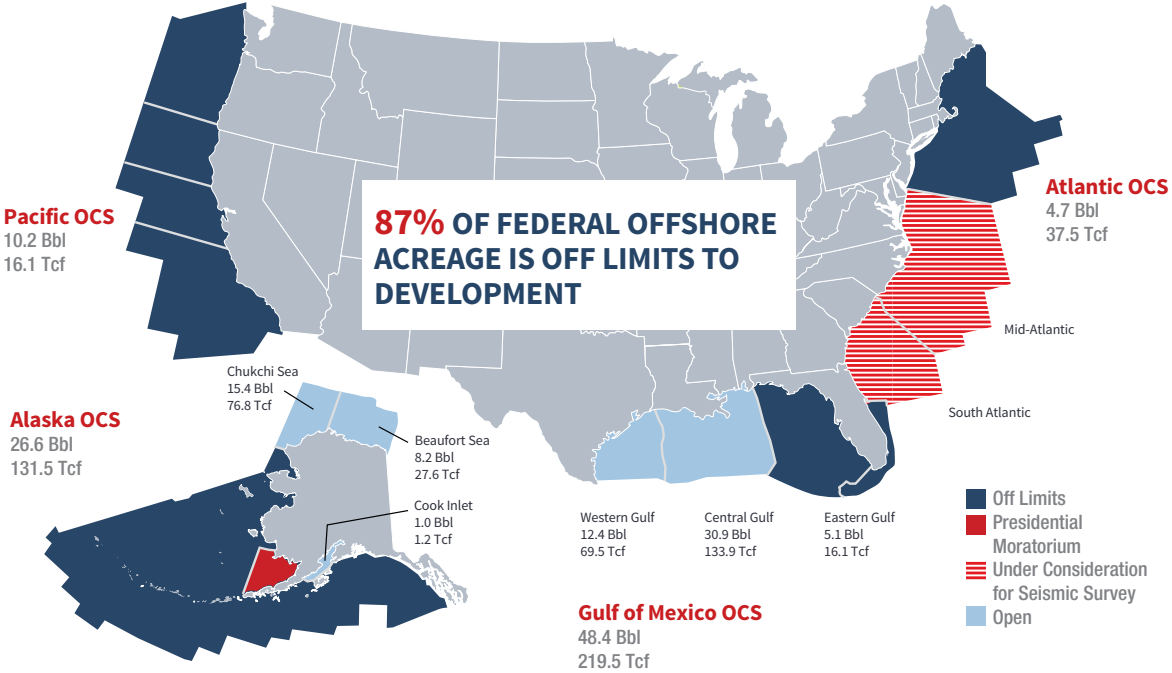
ACCESS TO OFFSHORE RESOURCES IS VITAL TO AMERICA'S ENERGY FUTURE

HOW TO STOP THE AMERICAN ENERGY REVOLUTION

Approximately **87 percent of our nation's offshore acreage is off-limits to energy production**. If production on federal lands had grown at the same rate as overall U.S. production, from **2009 through 2014, total royalties would have been 22 percent higher, with an additional $11 billion in royalties collected by the federal government.** That glaring difference is not just bad energy policy; it is also bad fiscal policy.

UNLOCKING AMERICA'S OFFSHORE ENERGY OPPORTUNITY

(Billion Barrels — Bbl and Trillion Cubic Feet — Tcf)



Source: The Bureau of Ocean Exploration and Management (BOEM) - http://www.boem.gov.

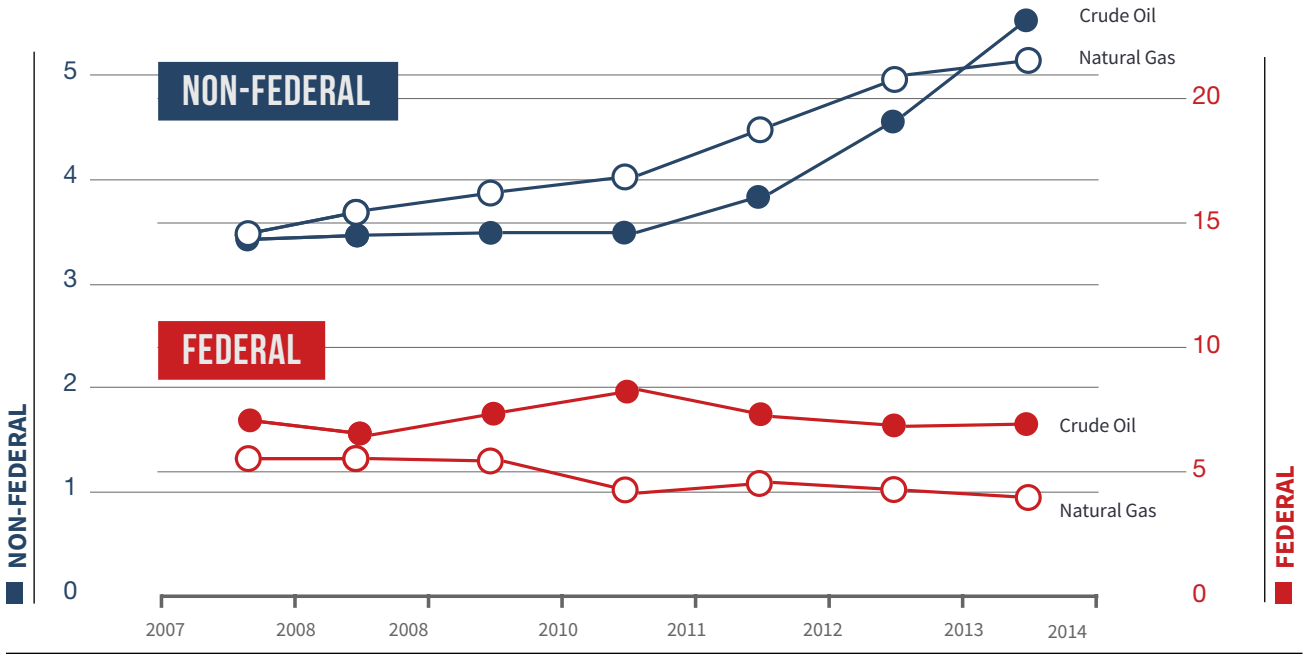
IN ORDER TO REMAIN A GLOBAL ENERGY SUPERPOWER, THE U.S. NEEDS A TRUE ALL OF THE ABOVE APPROACH TO ENERGY POLICY

HOW TO STOP THE AMERICAN ENERGY REVOLUTION

In the **private sector,** on state-controlled and private property, crude oil production increased by **88 percent,** and production grew **43 percent** for natural gas **between 2009 and 2014**. Conversely, on **federally controlled** land crude oil production has **remained flat** and natural gas production has **declined by 35 percent** during the same time period. Unnecessary restrictions on energy resource development on most federal land stifles our nation's ability to the produce the energy we need and hinders our ability to maintain American global energy leadership.

U.S. OIL AND NATURAL GAS PRODUCTION ON FEDERAL VS. NON-FEDERAL LANDS AND WATERS

Millions Barrels Per Day (Crude Oil) | Trillion Cubic Feet Per Day (Natural Gas)



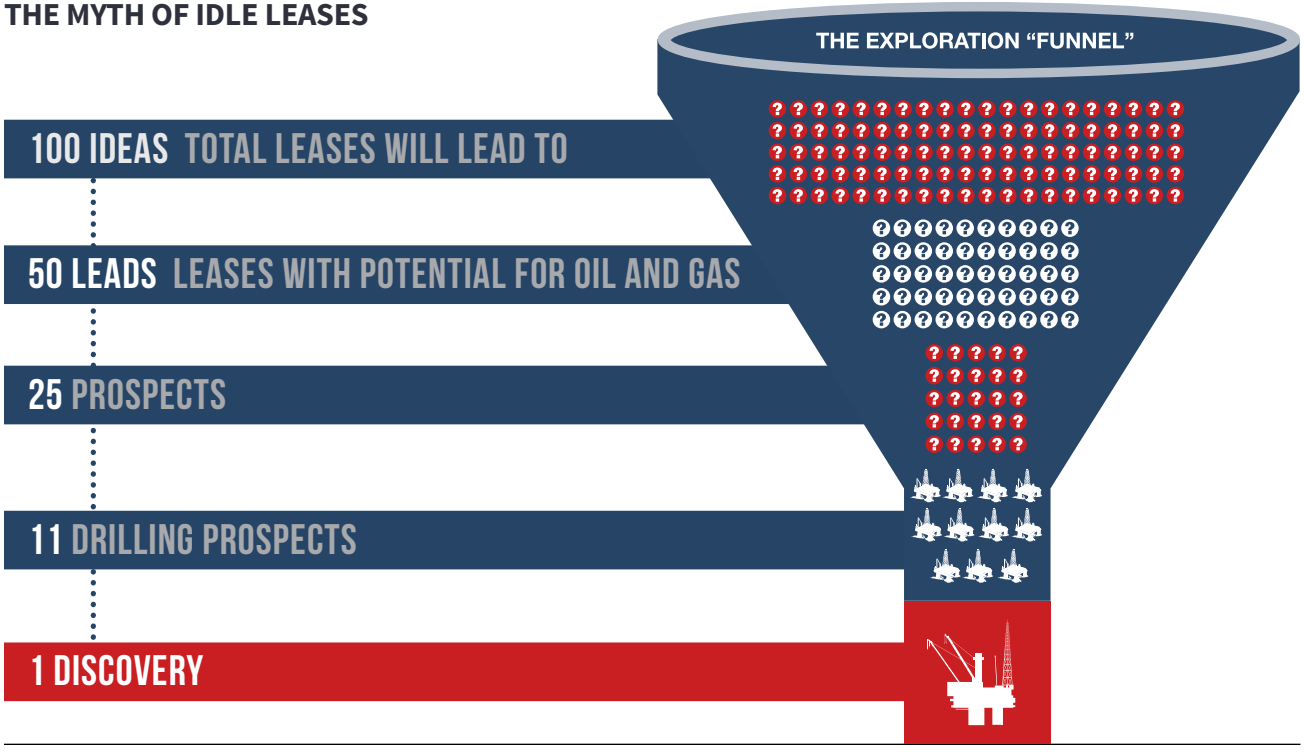
Source: CRS, "U.S. Crude Oil and Natural Gas Production in Federal and Non-Federal Areas," April 10, 2014 and February 28, 2013.

HOW MANY LEASES ARE REQUIRED TO ENSURE A 90% CHANCE OF DISCOVERY?

HOW TO STOP THE AMERICAN ENERGY REVOLUTION

Leases are widely misunderstood. There is no guarantee that a leased area actually has recoverable oil or natural gas resources. In fact, most do not! Additionally, leases that are labeled “idle,” or non-producing, are often under geological evaluation or in development.

THE MYTH OF IDLE LEASES



Source: API, 2008.

CONCLUSION

Energy is fundamental to our society. The policies that influence it should be based on facts with a focus on what's best for consumers and our economy. We have a once-in-a-generation opportunity to show the world how energy abundance can be used as a positive force.

Future generations are looking to us to get our nation's energy policy right. They are counting on us to leave them a country that is second-to-none in energy production, security and economic prosperity.

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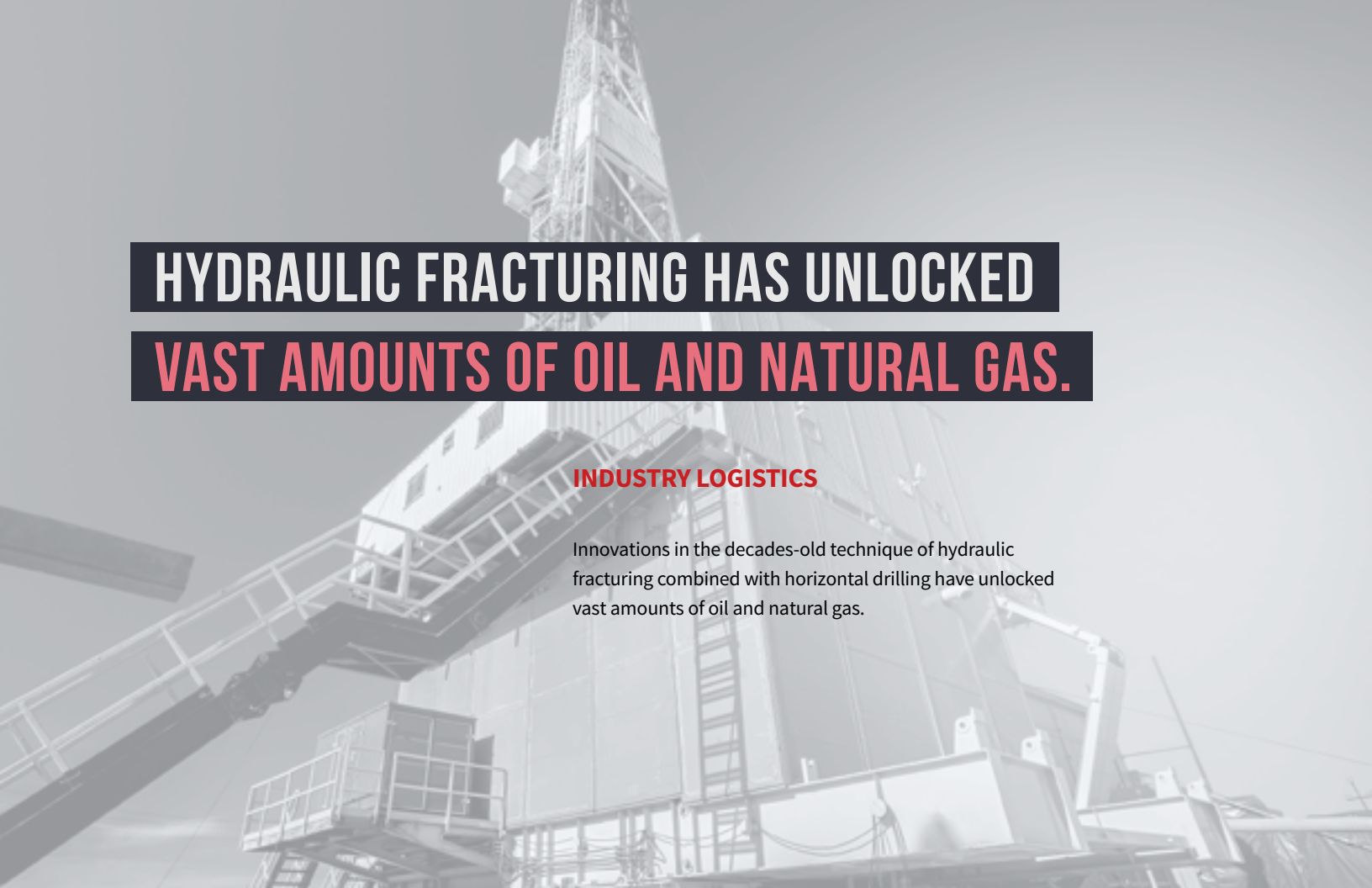
ENERGY RESOURCES

ENERGY IN CHARTS

INDUSTRY LOGISTICS

Production, Consumption and Storage.



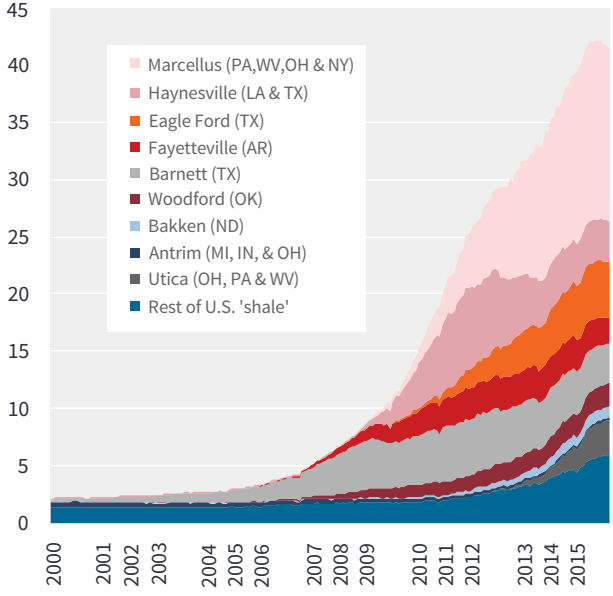
HYDRAULIC FRACTURING HAS UNLOCKED VAST AMOUNTS OF OIL AND NATURAL GAS.

INDUSTRY LOGISTICS

Innovations in the decades-old technique of hydraulic fracturing combined with horizontal drilling have unlocked vast amounts of oil and natural gas.

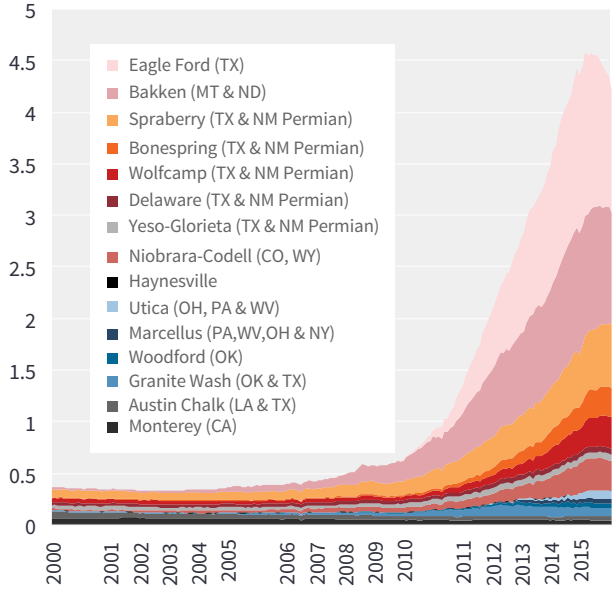
U.S. DRY SHALE NATURAL GAS PRODUCTION

Billion Cubic Feet Per Day



U.S. TIGHT OIL PRODUCTION

Million Barrels Per Day



Source: EIA, http://www.api.org/~/media/Files/Oil-and-Natural-Gas/Hydraulic-Fracturing-primer/Hydraulic-Fracturing-Primer-2015-highres.pdf

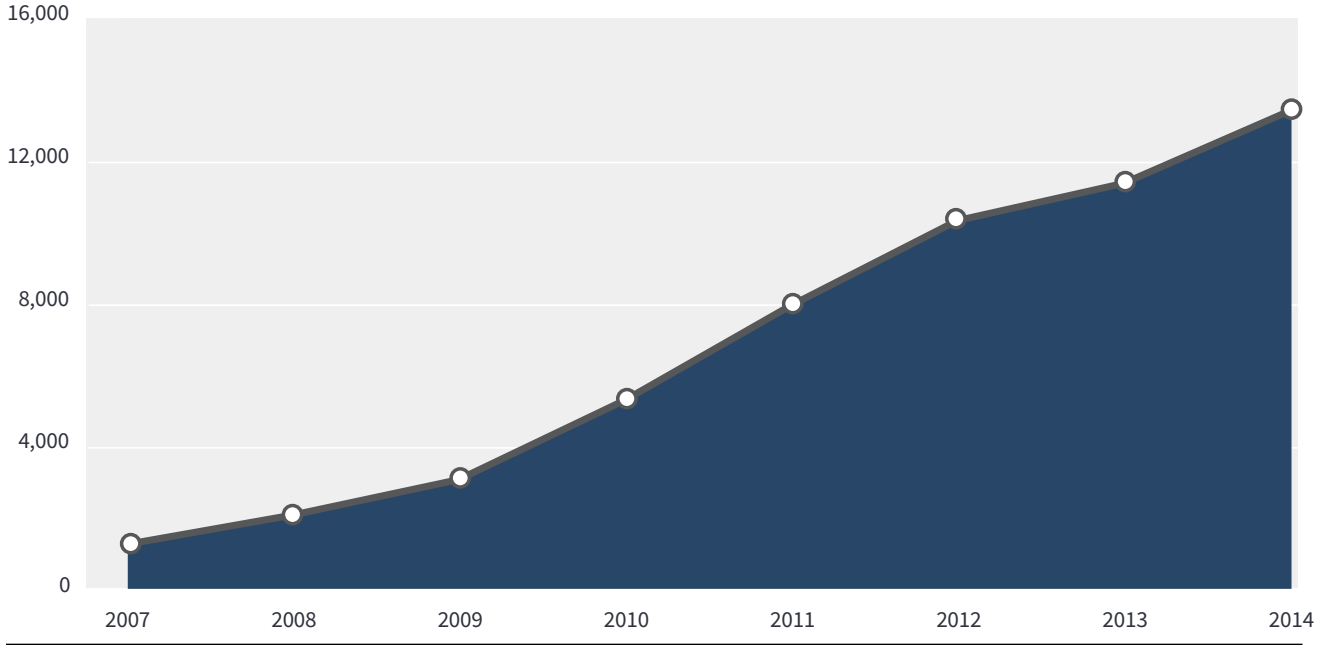
AMERICAN ENERGY LEADERSHIP

INDUSTRY LOGISTICS

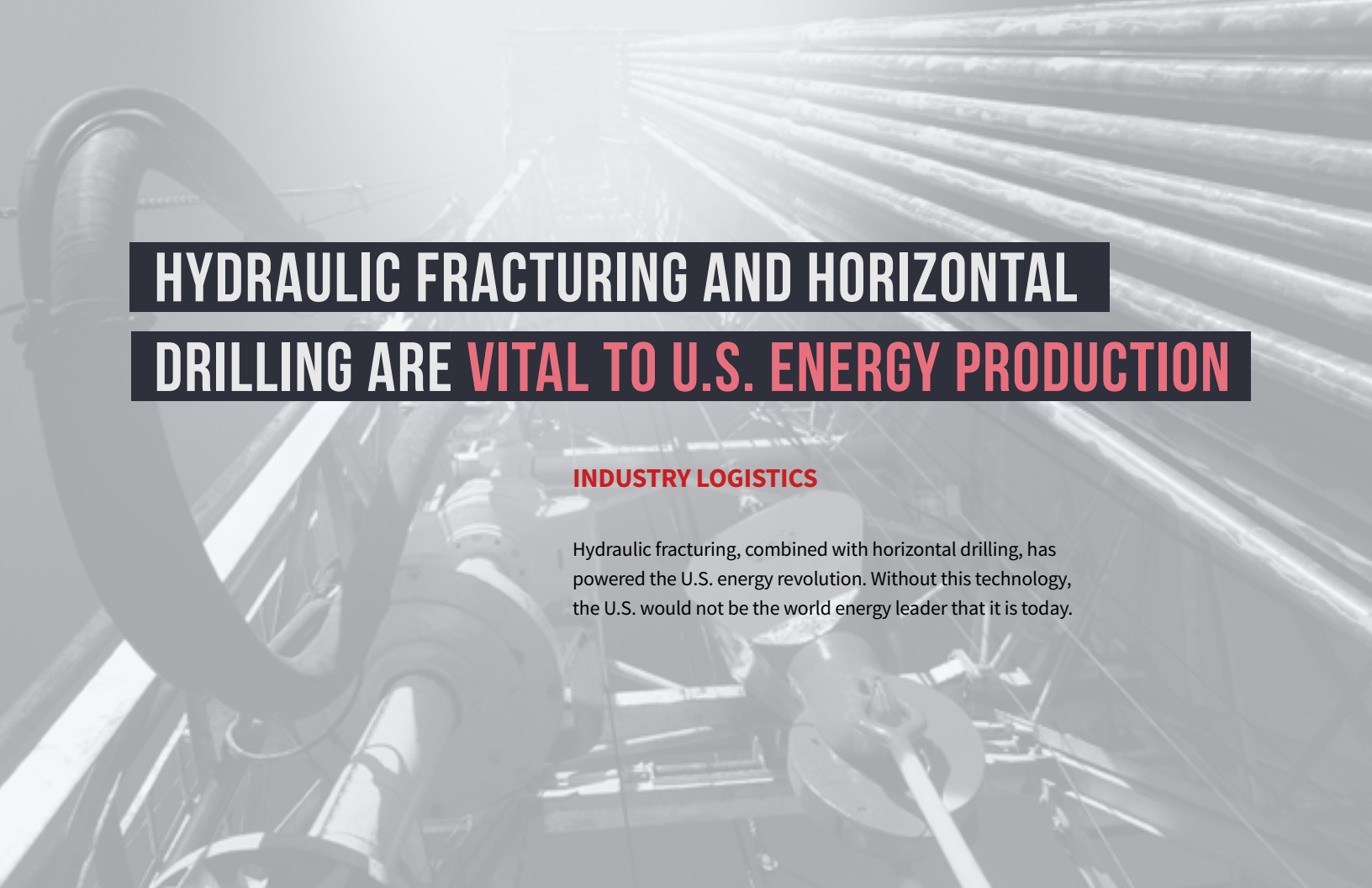
Increased domestic energy production helps to strengthen our nation's economy.

U.S. NATURAL GAS PRODUCTION

Billion Cubic Feet



Source: U.S. Energy Information Administration. https://www.eia.gov/dnav/ng/hist/res_epg0_r5302_nus_bcfa.htm

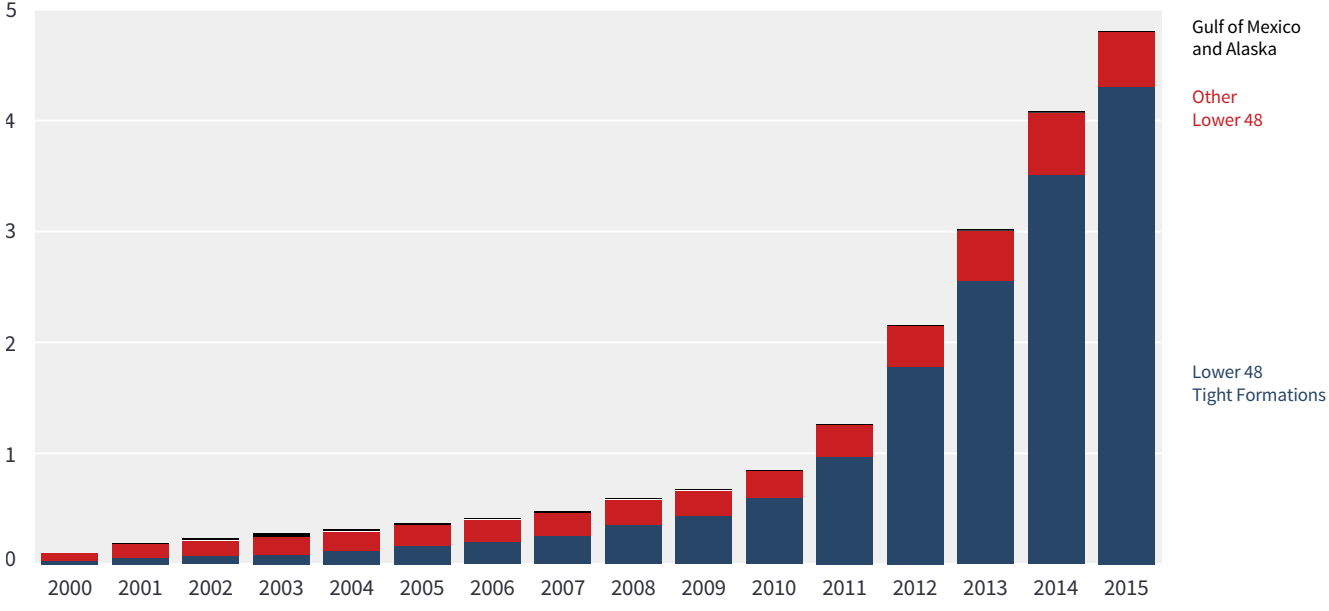


HYDRAULIC FRACTURING AND HORIZONTAL DRILLING ARE VITAL TO U.S. ENERGY PRODUCTION

INDUSTRY LOGISTICS

Hydraulic fracturing, combined with horizontal drilling, has powered the U.S. energy revolution. Without this technology, the U.S. would not be the world energy leader that it is today.

OIL PRODUCTION FROM HYDRAULICALLY FRACTURED WELLS IN THE UNITED STATES (2000-2015) Million Barrels Per Day



Source: CIA, https://www.cia.gov/redirects/ciaredirect.html?id=25372

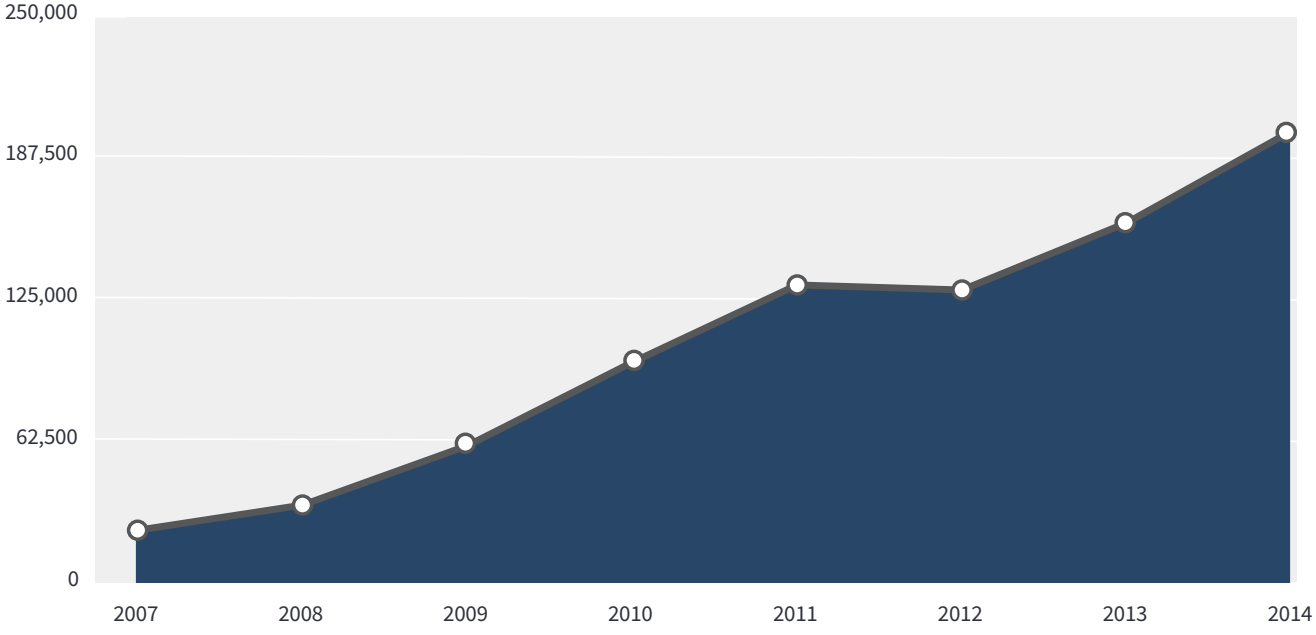
AMERICAN ENERGY SECURITY

INDUSTRY LOGISTICS

Increases in proved reserves allow the U.S. to remain a world energy leader and add to our nation's future energy security.

U.S. SHALE PROVED RESERVES

Billion Cubic Feet



Source: U.S. Energy Information Administration. https://www.eia.gov/dnav/ng/hist/res_epg0_r5301_nus_bcfa.htm

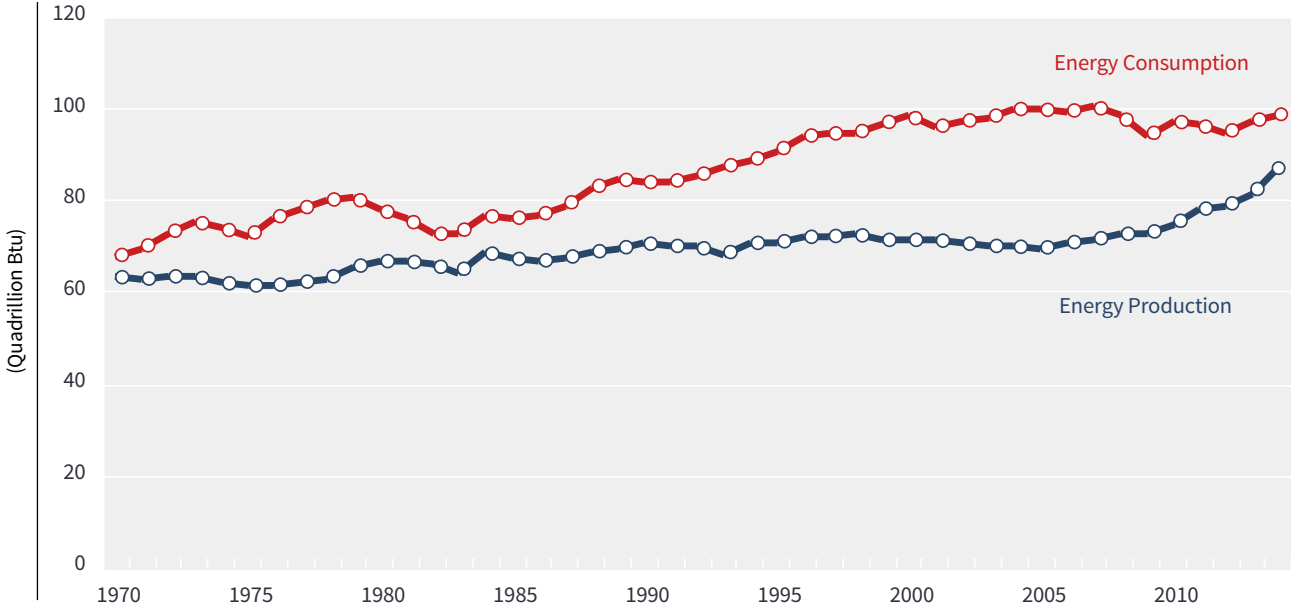
CONSUMPTION VS. PRODUCTION

INDUSTRY LOGISTICS

America's energy revolution is closing the gap between energy consumption and production.

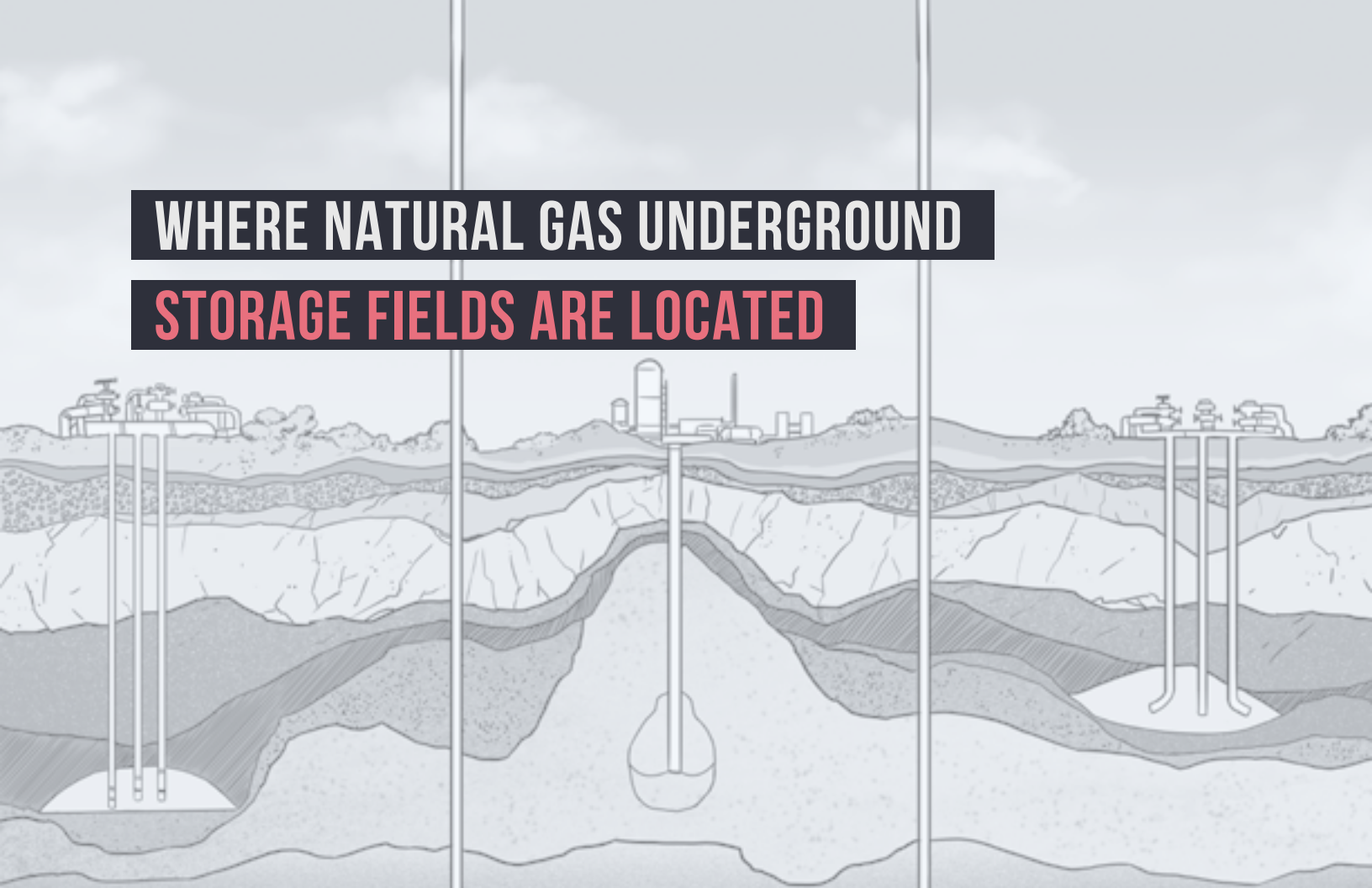
PRIMARY ENERGY OVERVIEW

Annual Totals, 1970-2014



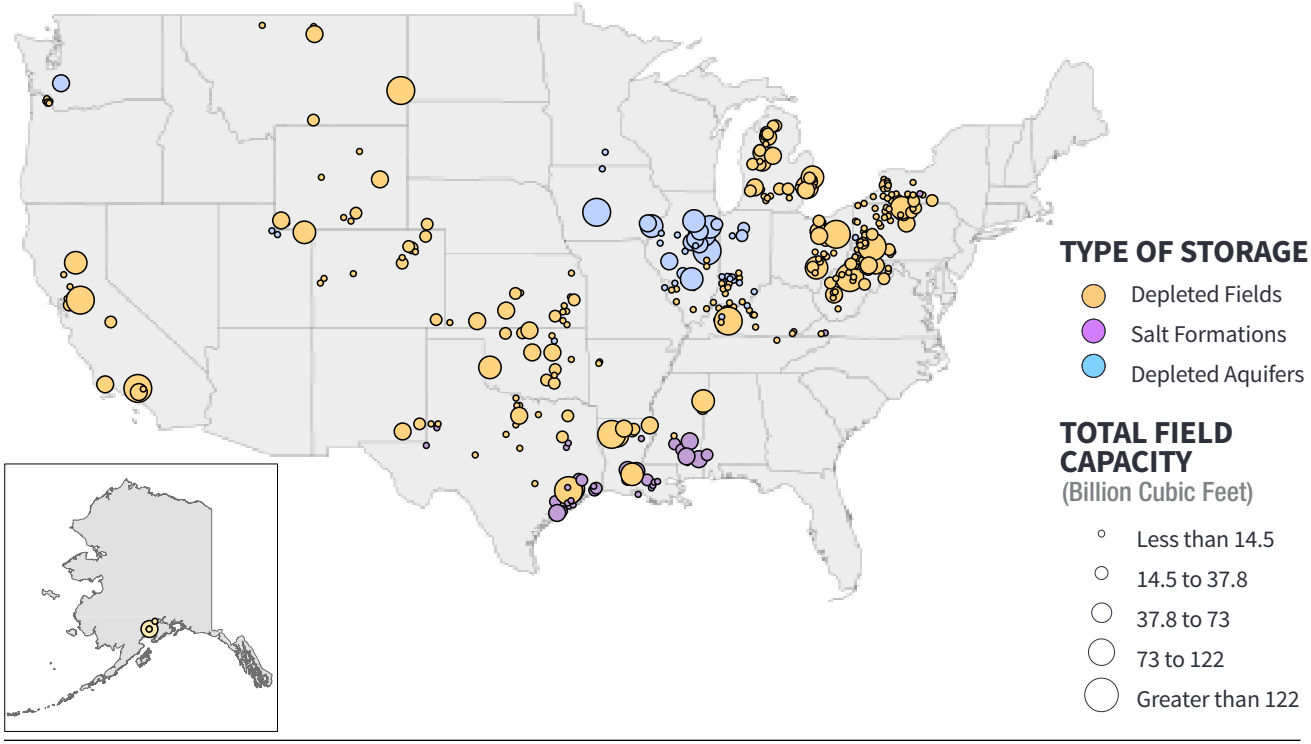
Source: EIA, http://www.eia.gov/totalenergy/data/monthly/dataunits.cfm

WHERE NATURAL GAS UNDERGROUND STORAGE FIELDS ARE LOCATED



WHERE NATURAL GAS UNDERGROUND STORAGE FIELDS ARE LOCATED

Type of Storage and Total Field Capacity, 2015



Source: EIA Energy Mapping System; EIA-191 Monthly Underground Gas Storage Report, 2015.
https://www.eia.gov/cfapps/ngqs/ngqs.cfm?f_report=RP7

Note: The map includes both active and inactive fields.

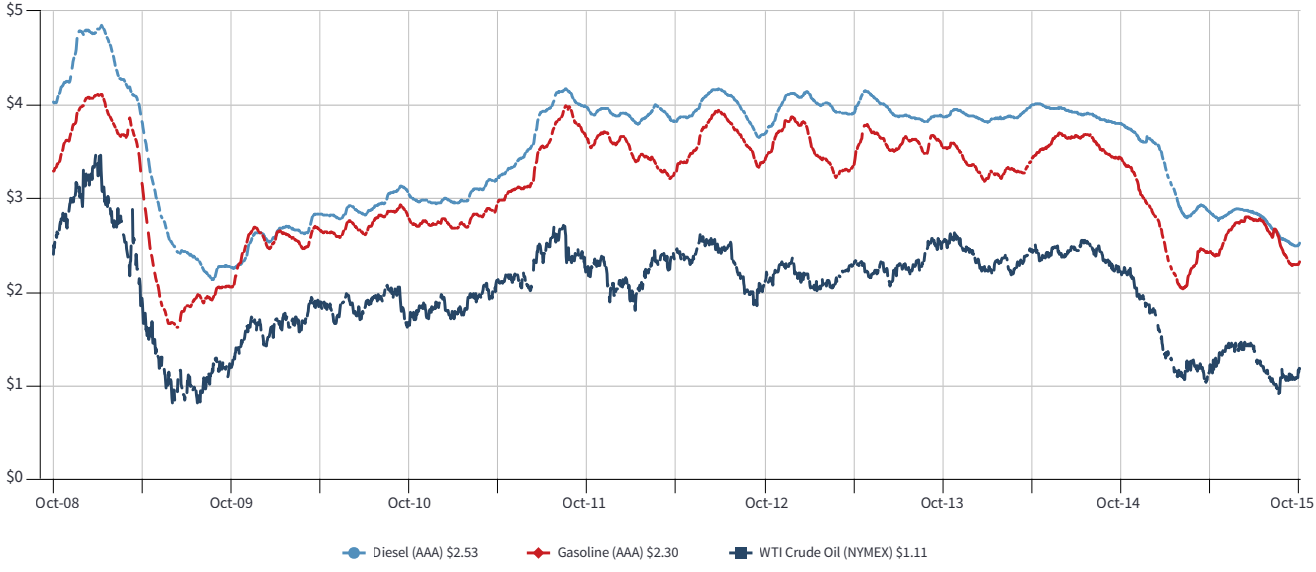
CHANGES IN GASOLINE AND DIESEL PRICES MIRROR CHANGES IN CRUDE OIL PRICES

INDUSTRY LOGISTICS

Price changes are determined in the global crude oil market by the worldwide demand for, and supply of, crude oil. Weak economic conditions in the U.S. and around the world in 2008 and into 2009 led to less demand, which helped push prices down.

GASOLINE, DIESEL AND CRUDE OIL PRICES

October 14, 2015



Source: NYMEX (WTI crude oil) and AAA (gasoline and diesel).

OIL PRICES RELATE TO MANY UNCERTAIN FACTORS

INDUSTRY LOGISTICS

Crude oil prices are set globally through the daily interactions of thousands of buyers and sellers in both physical and futures markets, and reflect participants' knowledge and expectations of demand and supply. In addition to economic growth and geopolitical risks, other factors, including weather events, inventories, exchange rates, investments, spare capacity, OPEC production decisions, and non-OPEC supply growth all figure into the price of crude oil.


NON-OPEC SUPPLY GROWTH
WEATHER
INVENTORIES
OPEC PRODUCTION DECISIONS
SPECULATION, HEDGING, INVESTMENT
SPARE PRODUCTION CAPACITY
GLOBAL ECONOMIC GROWTH
GEOPOLITICAL RISKS
GLOBAL
OIL PRICES

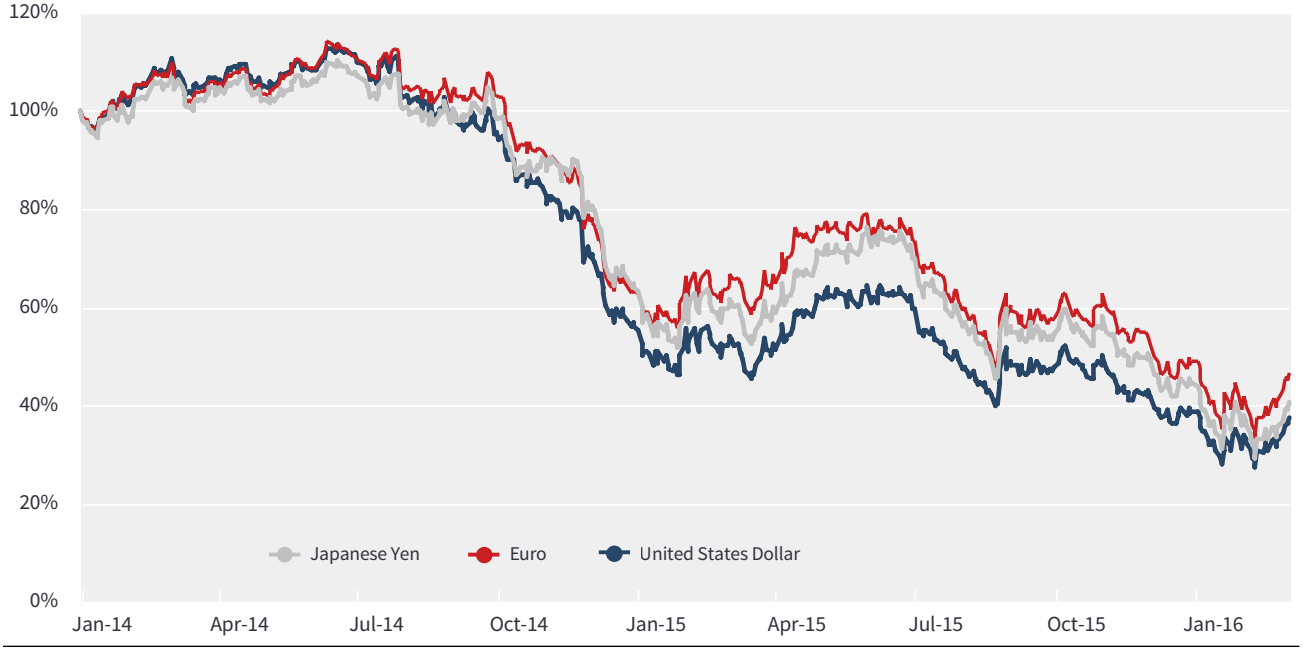
Source: EIA.

THE VALUE OF THE DOLLAR MAKES A DIFFERENCE

INDUSTRY LOGISTICS

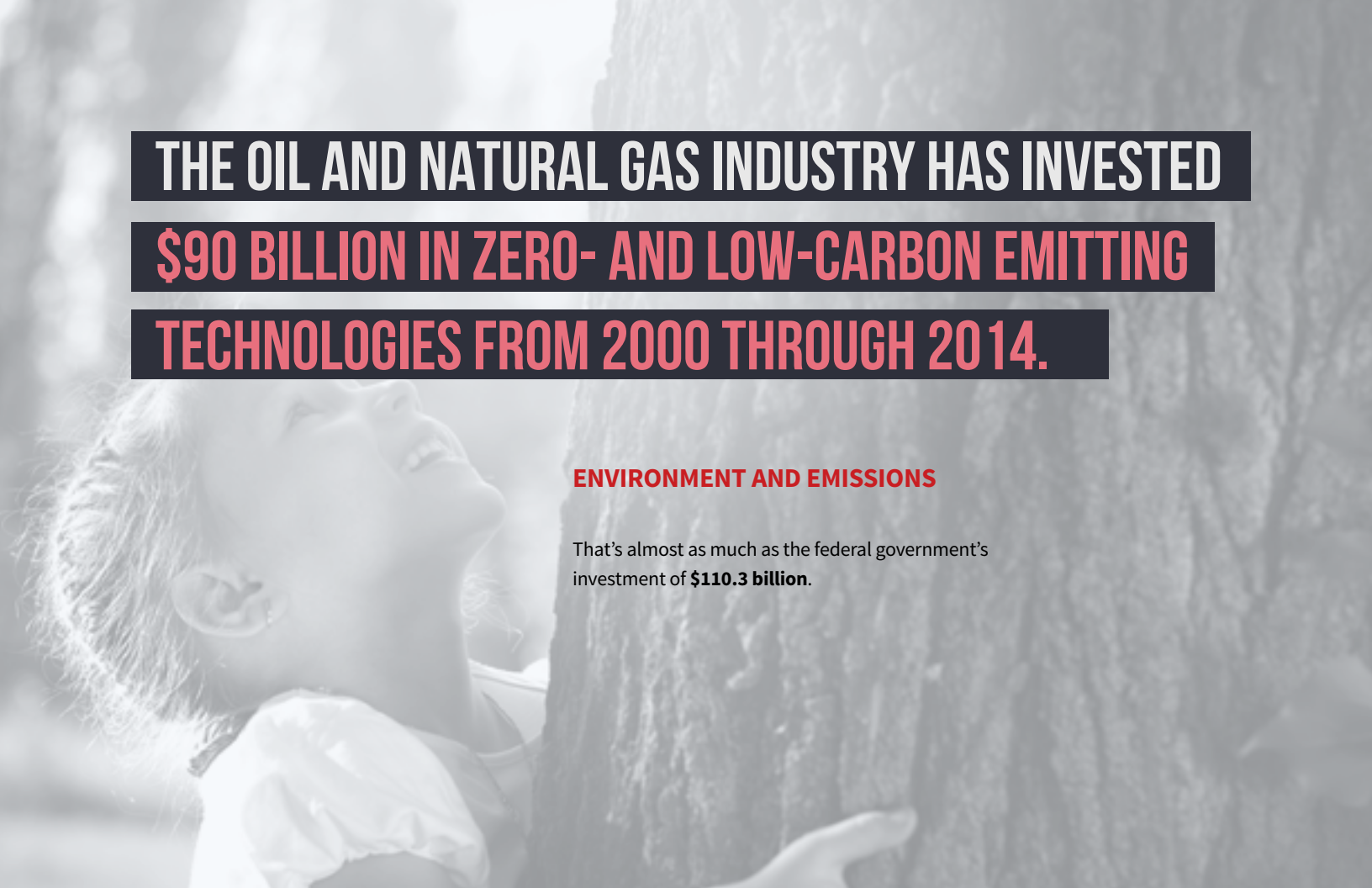
The strength of the U.S. dollar against other currencies around the world has widened compared to the Yen and the Euro.

PERCENT CHANGE OF WEST TEXAS INTERMEDIATE CRUDE (WTI) IN DOLLARS, EUROS, AND YEN



Source: Federal Reserve Bank of St. Louis, Energy Information Administration.

ENVIRONMENT AND EMISSIONS



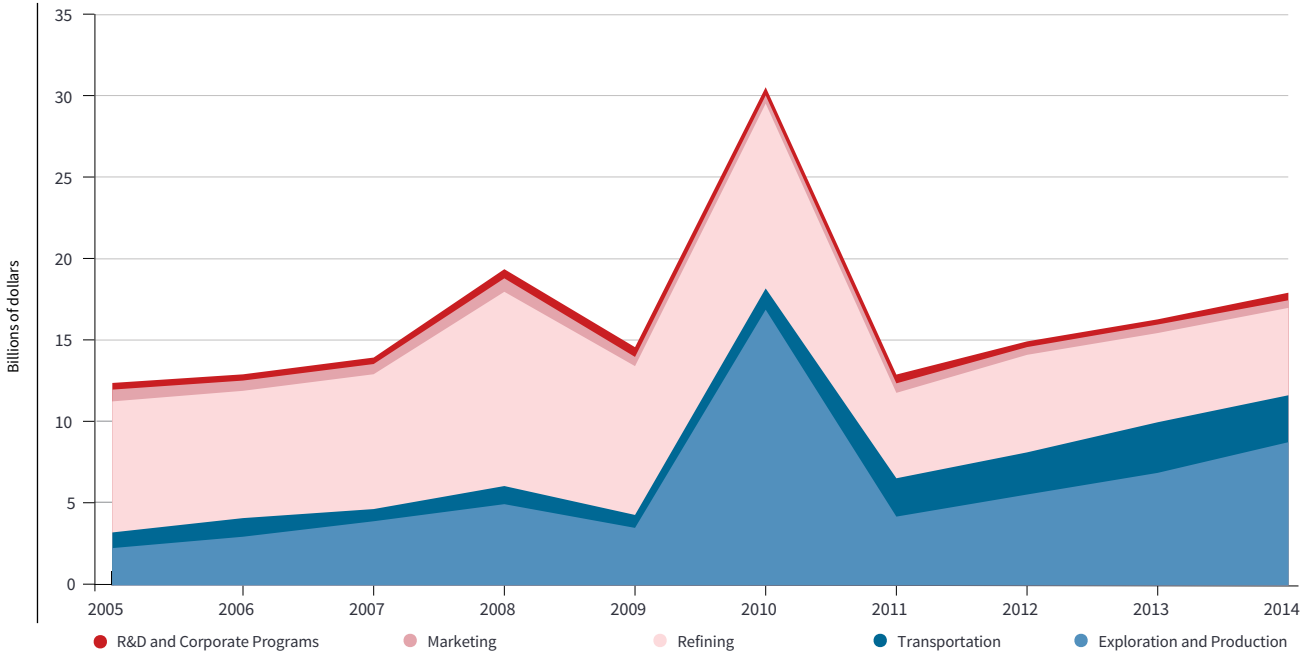
THE OIL AND NATURAL GAS INDUSTRY HAS INVESTED $90 BILLION IN ZERO- AND LOW-CARBON EMITTING TECHNOLOGIES FROM 2000 THROUGH 2014.

ENVIRONMENT AND EMISSIONS

That's almost as much as the federal government's investment of **$110.3 billion**.

U.S. ENVIRONMENTAL EXPENDITURES SINCE 2005

(Includes Expenditures on Remediation and Spills)



All expenditures are estimated except for remediation and spills.

In 2010, Remediation and spills are unusually high because of an outlier event.

Source: API Report: http://www.api.org/~/media/Files/Publications/Environmental-Expenditures-2015.pdf

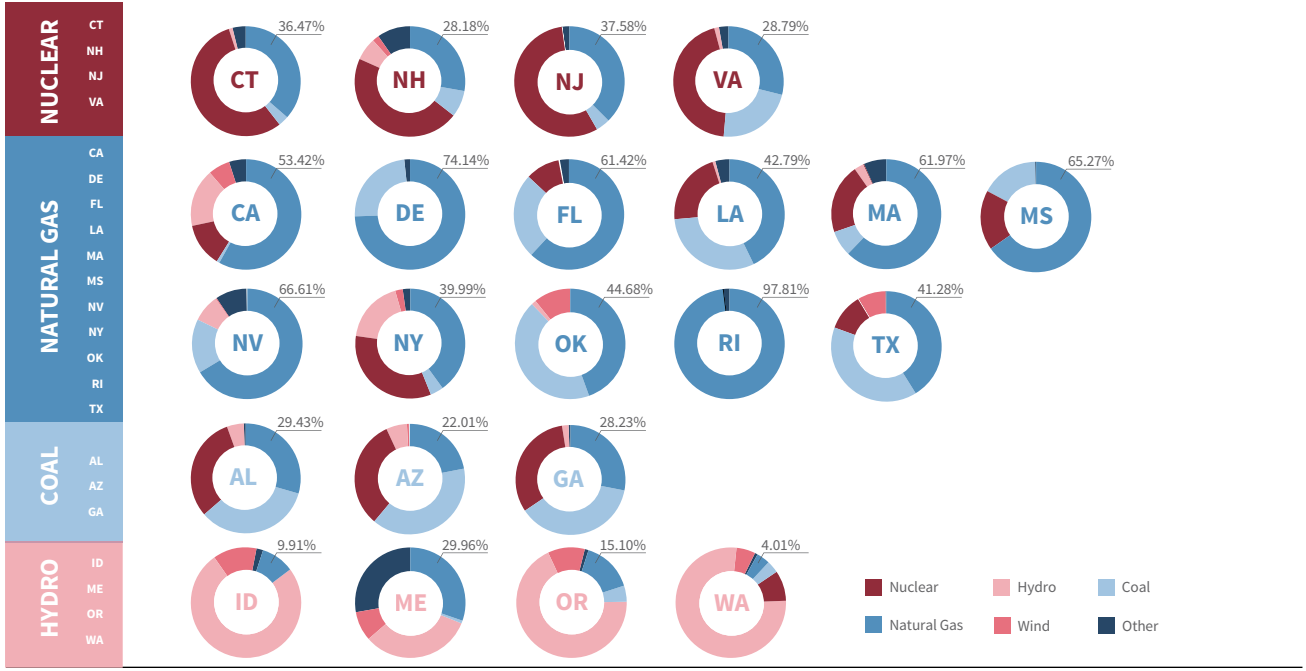
LETTING MARKETS WORK

ENVIRONMENT AND EMISSIONS

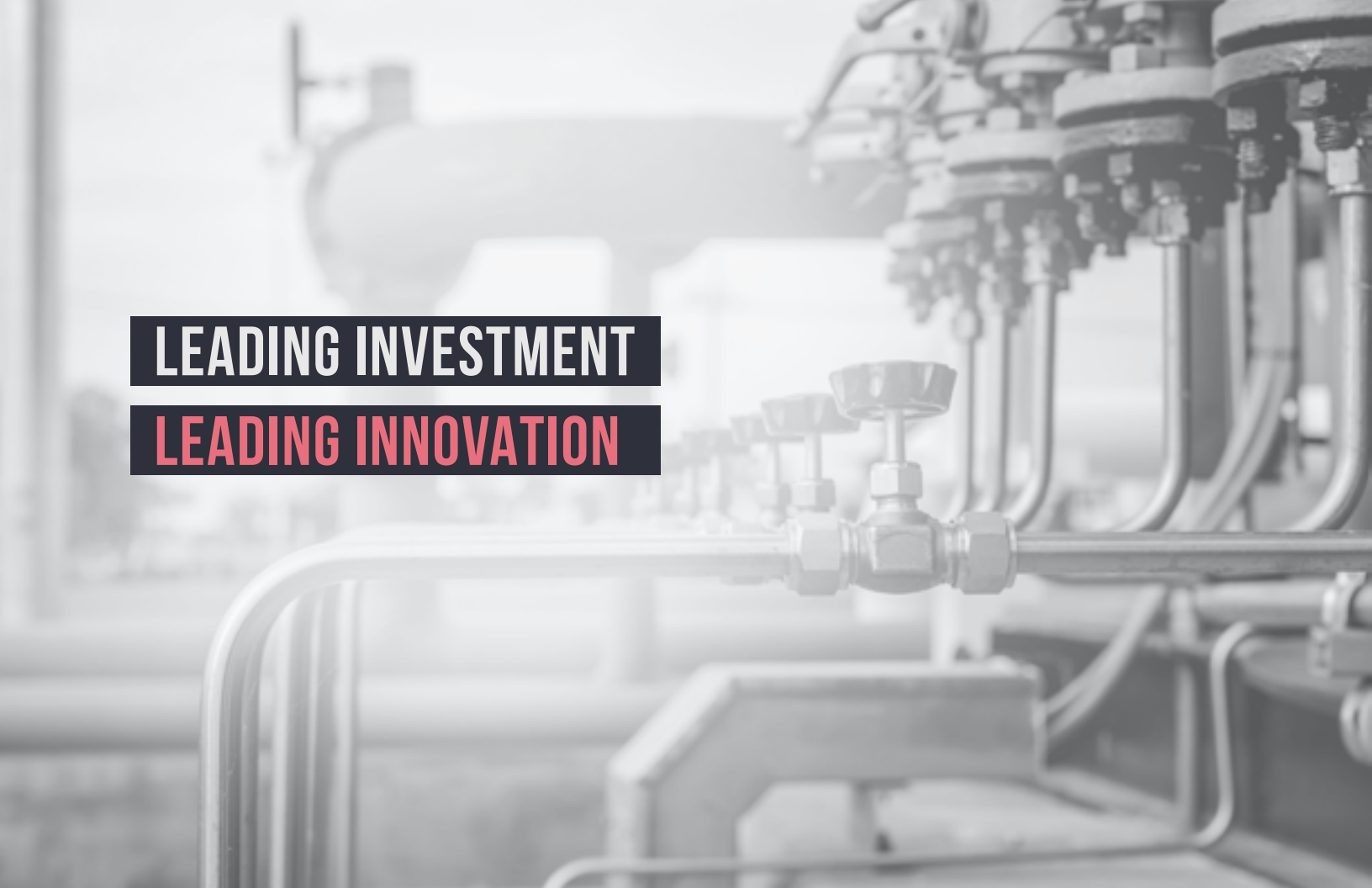
Natural gas is a leading energy source in many states with below average emissions. Yet , EPA seeks to downplay natural gas use. This is what happens when ideology and politics trump science.

STATES WITH BELOW AVERAGE EMISSION RATES

Primary Fuel Sources

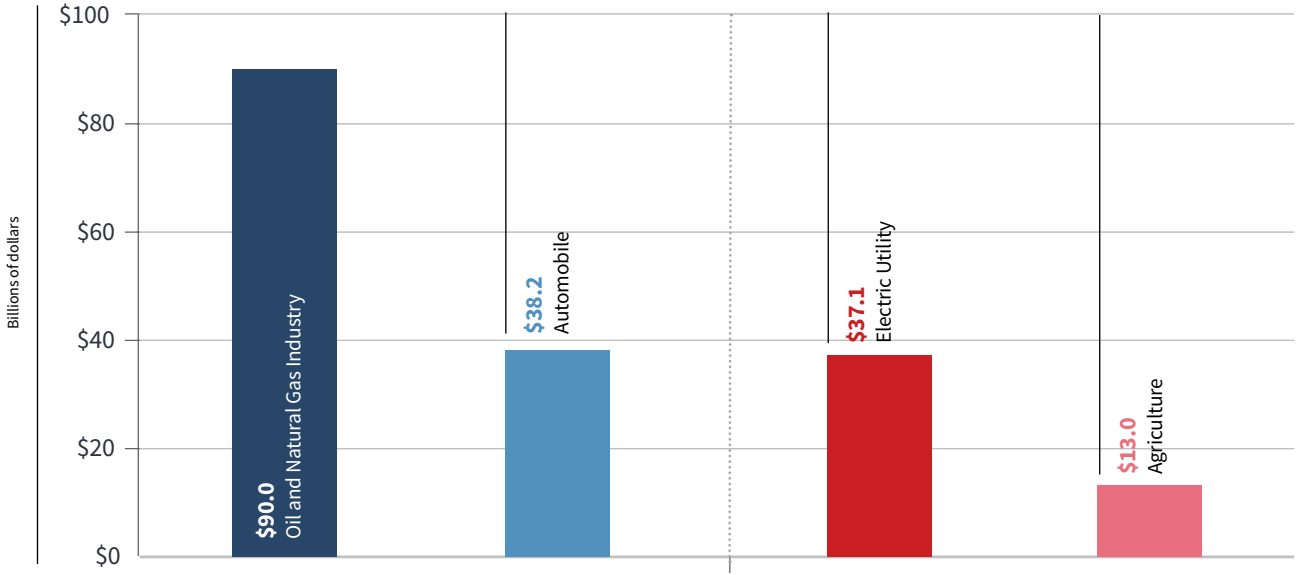


Source: U.S. Energy Information Administration, State Energy Data System.


LEADING INVESTMENT
LEADING INNOVATION

SPENDING TO REDUCE GHG EMISSIONS

Leading Private Investors 2000-2014



Source: T2 & Associates, "Key Investments in Greenhouse Gas Mitigation Technologies from 2000 Through 2014 by Oil and Gas Firms, Other Industry and the Federal Government," September 2015.

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http://www.api.org
http://www.energytomorrow.org