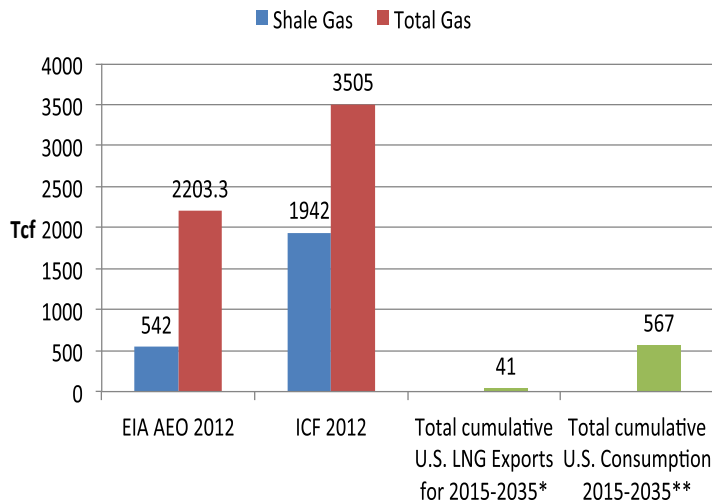


U.S. Liquefied Natural Gas Exports: America's Opportunity and Advantage

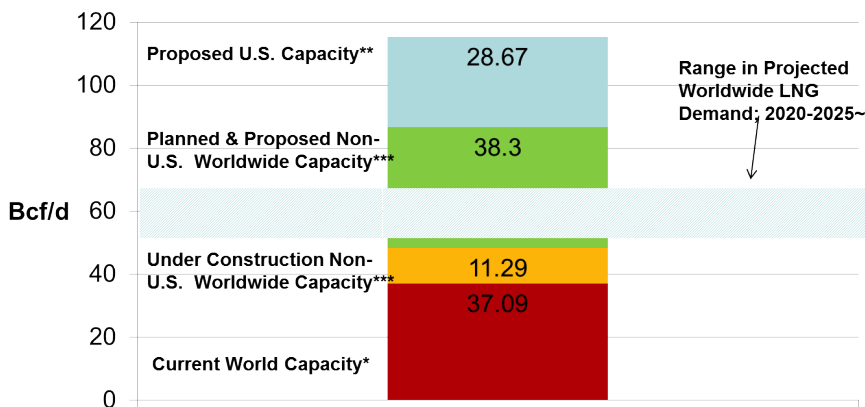
Estimates of U.S. Total Natural Gas Resource Base vs Total U.S. LNG Exports and Consumption



Projected U.S. LNG exports are less than 8% of projected U.S. consumption; and less than 2% of EIA's estimates of the U.S. total natural gas resource base.

*20 years of 6 bcf/d of LNG exports phased in between 2015 and 2020 reaching 6 bcf/d in 2020 and thereafter.
 **Source: EIA AEO 2013ER

Worldwide Planned and Proposed LNG Liquefaction Capacity Well Exceeds Projected Demand in the U.S. and the Rest of the World



The world's projected demand (in 2020-2025) for LNG is 50-65 bcf/d. However, 37 bcf/d already exists. That leaves only 13-28 bcf/d of demand needed to meet worldwide demand for LNG.

* ICF estimate for year end 2011.
 **FTA Applications to DOE as of Nov. 29, 2012.
 ***Dec 2012 ICF estimate based on current worldwide project list.
 ~Poten, BG Group, Credit Suisse, Facts Global