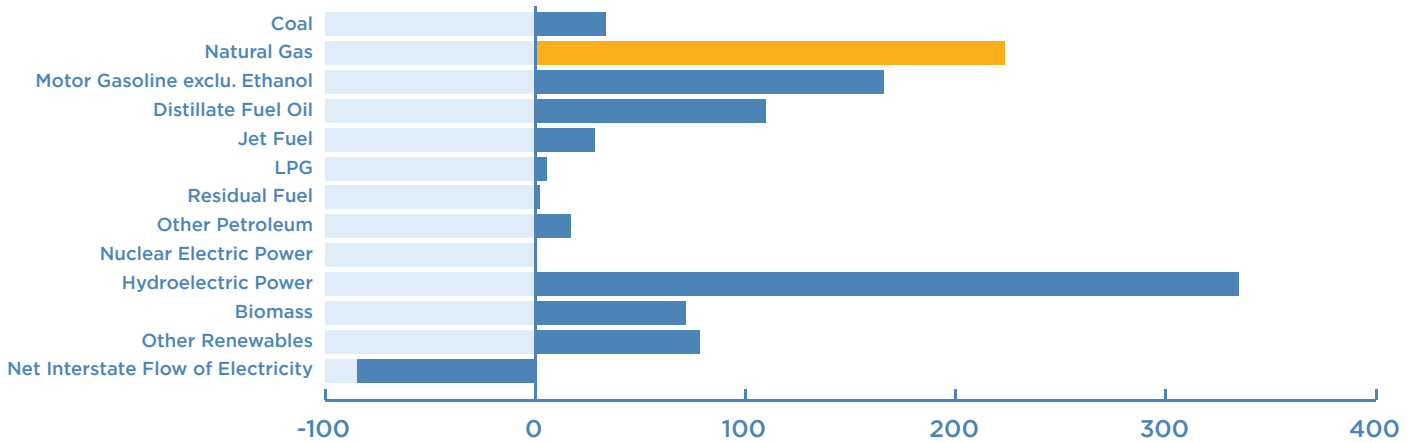


OREGON



The U.S. oil and natural gas industry provides energy security and economic benefits to our nation, supporting more than 9.8 million jobs and contributing \$1.2 trillion in added value to the economy.

OREGON ENERGY IS ALL OF THE ABOVE



U.S. ENERGY INFORMATION ADMINISTRATION CONSUMPTION ESTIMATES, 2014
Trillion Btu



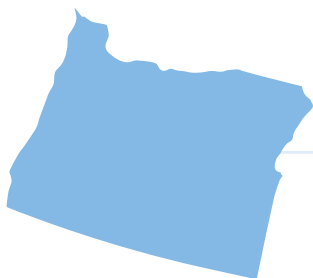
FOCUS: RENEWABLE FUEL STANDARD

“Most ethanol used in this country is starch-based, made from corn. And despite the hype when it was first introduced, it has serious problems. It’s driven food prices up worldwide, according to researchers at schools ranging from the University of California, Davis, to Tufts University in Massachusetts. It’s led to the loss of wildlife habitat as subsidies to farmers have persuaded them to plow their most marginal lands, releasing tons of carbon as they go. And it’s done almost nothing to reduce greenhouse gases. Meanwhile, the cleaner cellulosic ethanol is still in the developmental stage and is terribly expensive to produce, even in its current limited supply.”

Editorial, The Bulletin (Bend, Ore.)



OREGON ENERGY OVERVIEW



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Hydroelectric power provides more than half of the state’s net electricity generation.

The Mist field in northwestern Oregon is the only producing natural gas field in the Pacific Northwest. The mild temperatures and abundant rainfall in the western part of the state also contribute to rapid tree growth, which, along with agricultural waste-products, provides an ample source of biomass.



THE IMPACTS OF ENERGY POLICY CHOICES

Oil and natural gas innovations and investments have moved the U.S. from an era of energy scarcity to one of energy abundance in a few short years. Washington can make energy policy choices that will either continue or hinder America's energy renaissance.

POTENTIAL IMPACT ON U.S. (BY 2035)	MORE	
	PRO-ENERGY POLICIES	REGULATORY CONSTRAINTS
Oil & Natural Gas Production (MMboed)	+8.0	- 3.4
Total Jobs supported	+2.3 million	-830 thousand
GDP / Year	+\$443 billion	- \$133 billion
Total Government Revenue / Year	+\$122 billion	- \$18 billion
Cumulative Government Revenue from 2016	+\$1.08 trillion	- \$500 billion
Total Household Income / Year	+\$118 billion	- \$43 billion
Average Household Energy Expense	-\$360/ year	+ \$242 / year

Source: <http://www.eia.gov/energy/policy/wood-mackenzie-report-2015.pdf>
MMboed = Million Barrel Oil Equivalent Per Day

LESS



FOCUS: NATURAL GAS

"Our region is committed to developing renewable resources. Because the wind doesn't blow all the time in the Northwest, we need a power source that can turn on and off quickly – ensuring that we have a steady flow of electricity. That's where natural gas comes in."

NW Natural Gas Company

