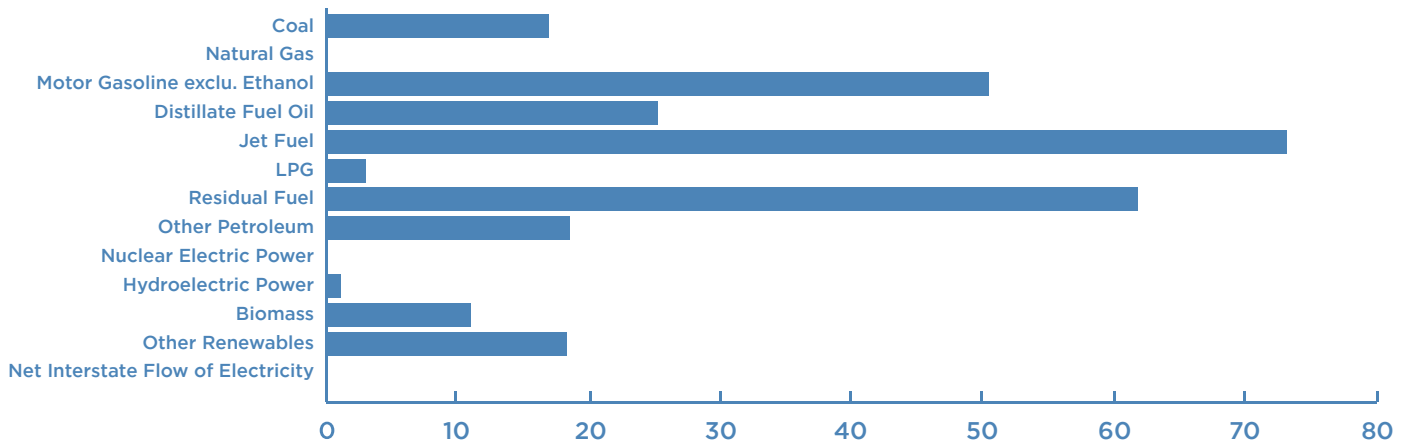


HAWAII



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.

HAWAII ENERGY IS ALL OF THE ABOVE



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



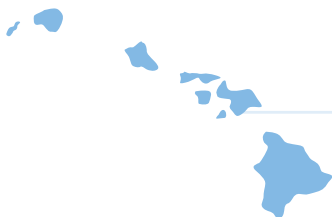
FOCUS: NATURAL GAS ACCESS

"We want to bring larger scale natural gas to the islands. ... As we move forward in Hawaii with our renewal energy programs, we need to have firm power. We will have natural disasters. We need to have a mixture of fuel sources because that's how a community is probably the safest."

Joseph J. Boivin Jr., Hawaii Gas senior vice president



HAWAII ENERGY OVERVIEW



#50

With no natural gas production of its own and no gas reserves, Hawaii has the lowest natural gas consumption in the nation.

Hawaii's geographic isolation and its lack of oil and natural gas reserves make its energy situation unique among the states. The U.S. Energy Information Administration says that in 2013, Hawaii imported 91 percent of the energy it used and in 2014 had the highest electricity prices in the nation. Thanks to its location, Hawaii is at the forefront of efforts to harness ocean wave energy.



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	+8.0 MMboed	-3.4 MMboed
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 per year	+\$242 per year

Source: <http://www.eia.org/~/media/Files/Policy/Jobs/Wood-Mackenzie-Report-2015.pdf>
MMboed = Million Barrel Oil Equivalent Per Day

LESS



FOCUS: RENEWABLE FUEL STANDARD

“We used to change about one fuel pump a year. Now we get to change about 15 or 20 fuel pumps a year. It’s been a boom for business. I mean customers are paying anywhere from \$400 to \$1,000 per fuel pump job.”

Frank Young, Honolulu auto repair business owner, on ethanol-related engine damage

