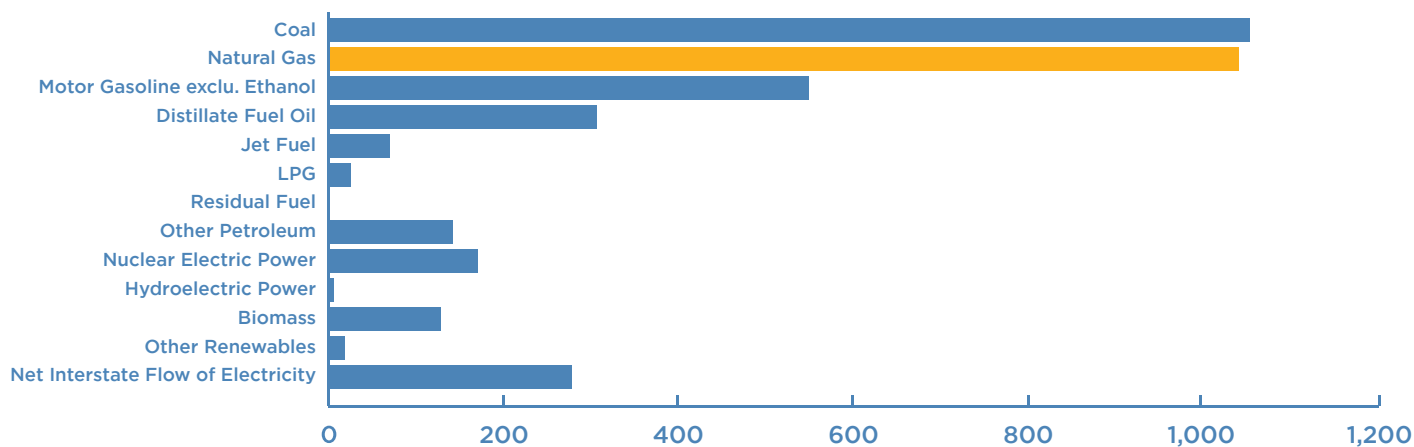


# OHIO



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.

## OHIO ENERGY IS ALL OF THE ABOVE



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



### FOCUS: HYDRAULIC FRACTURING (FRACKING)

"It's so important for us to be energy independent, and we're getting there because of fracking."

**Gov. John Kasich**



## OHIO ENERGY OVERVIEW



### 50.6 percent

Growth in the state's natural gas production, second quarter 2015 to second quarter 2016 (total of 334 billion cubic feet).

With the growth of hydraulic fracturing in the portion of the Utica shale formation inside the state, Ohio's natural gas output has grown nearly 1200 percent since 2010. With its large population, heavily industrial economy and highly variable climate, the state is among the top 10 states in total energy consumption. Ohio had the seventh largest crude oil refining capacity in the nation in 2015.



### 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	<b>+8.0 MMboed</b>	<b>-3.4 MMboed</b>
Total Jobs supported	<b>+2.3 million</b>	<b>-830 thousand</b>
GDP / Year	<b>+\$443 billion</b>	<b>-\$133 billion</b>
Total Government Revenue / Year	<b>+\$122 billion</b>	<b>-\$18 billion</b>
Cumulative Government Revenue from 2016	<b>+\$1.08 trillion</b>	<b>-\$500 billion</b>
Total Household Income / Year	<b>+\$118 billion</b>	<b>-\$43 billion</b>
Average Household Energy Expense	<b>-\$360 per year</b>	<b>+\$242 per year</b>

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

LESS



#### FOCUS: INFRASTRUCTURE

“In the Utica, what’s really going on there is sort of the macro environment slowing the rate of growth for producer customers; they’re really motivated by the ultimate netbacks up there. ... And we’re still seeing very strong upstream economics for them, but the pace of drilling is really, for them, focused on the downstream pipeline projects ... like Rover.”

**Nancy Buese, MPLX Energy Logistics, on the Rover natural gas pipeline**

