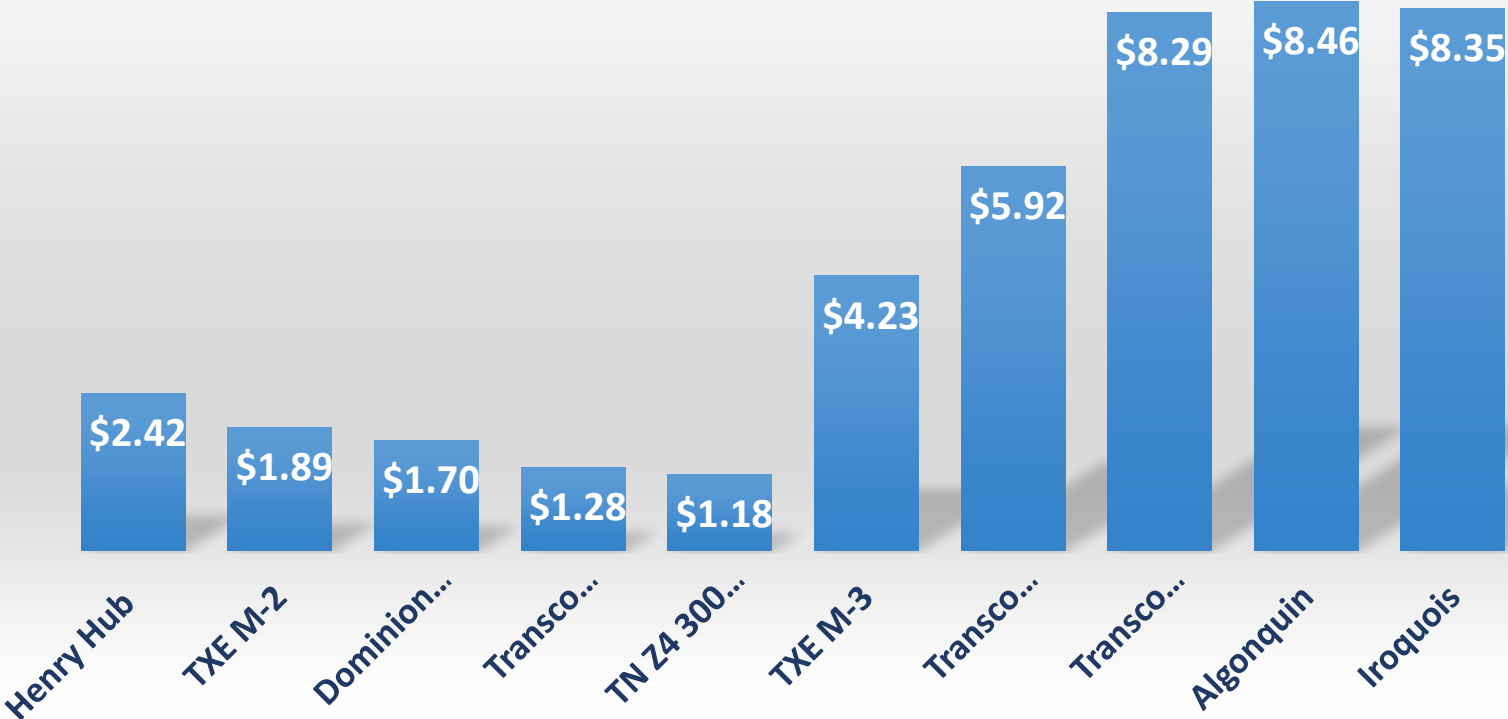


A sunset over the ocean with a bright sun low on the horizon, creating a golden glow and a reflection on the water. The sky is filled with soft, wispy clouds in shades of blue, orange, and yellow.

**Challenges and
Opportunities:
*Natural Gas
Infrastructure***

Intercontinental Exchange (ICE) January 2016 Natural Gas Futures Derived Prices

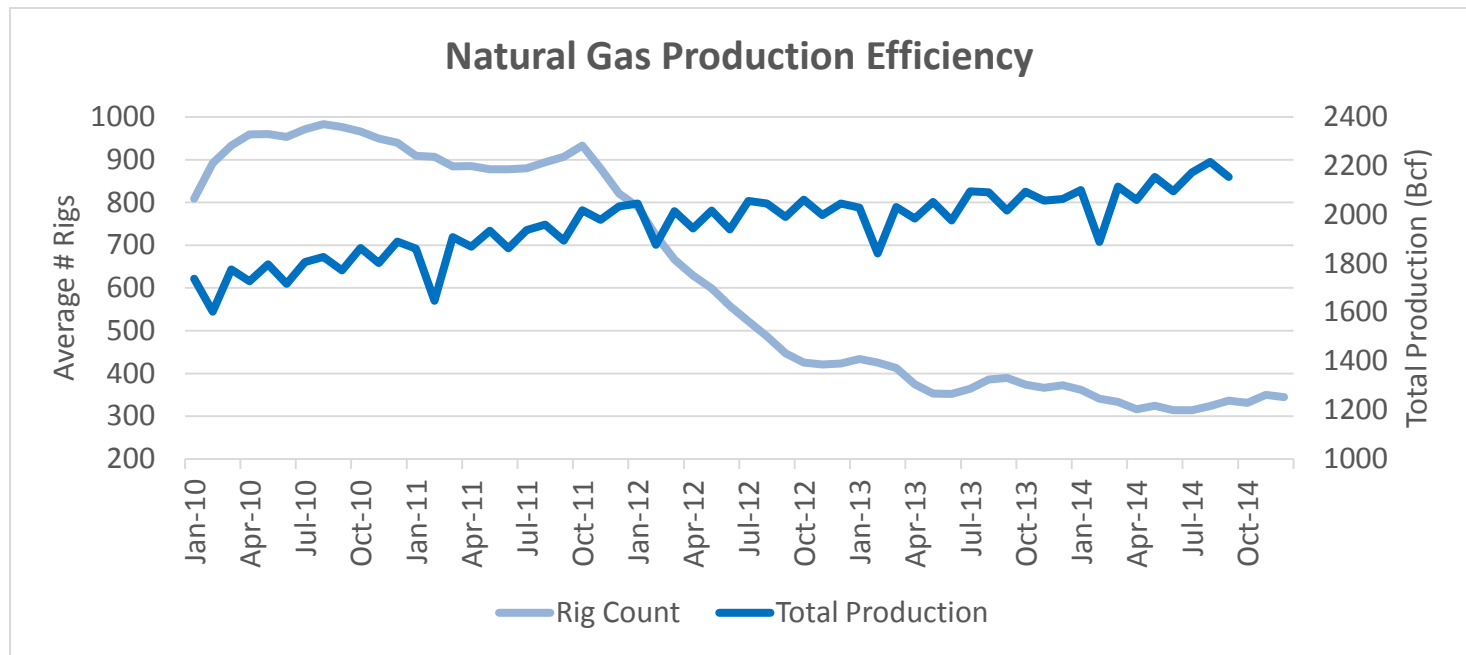
10/29/15 Settlements



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**Challenges and
Opportunities:
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Production Efficiency

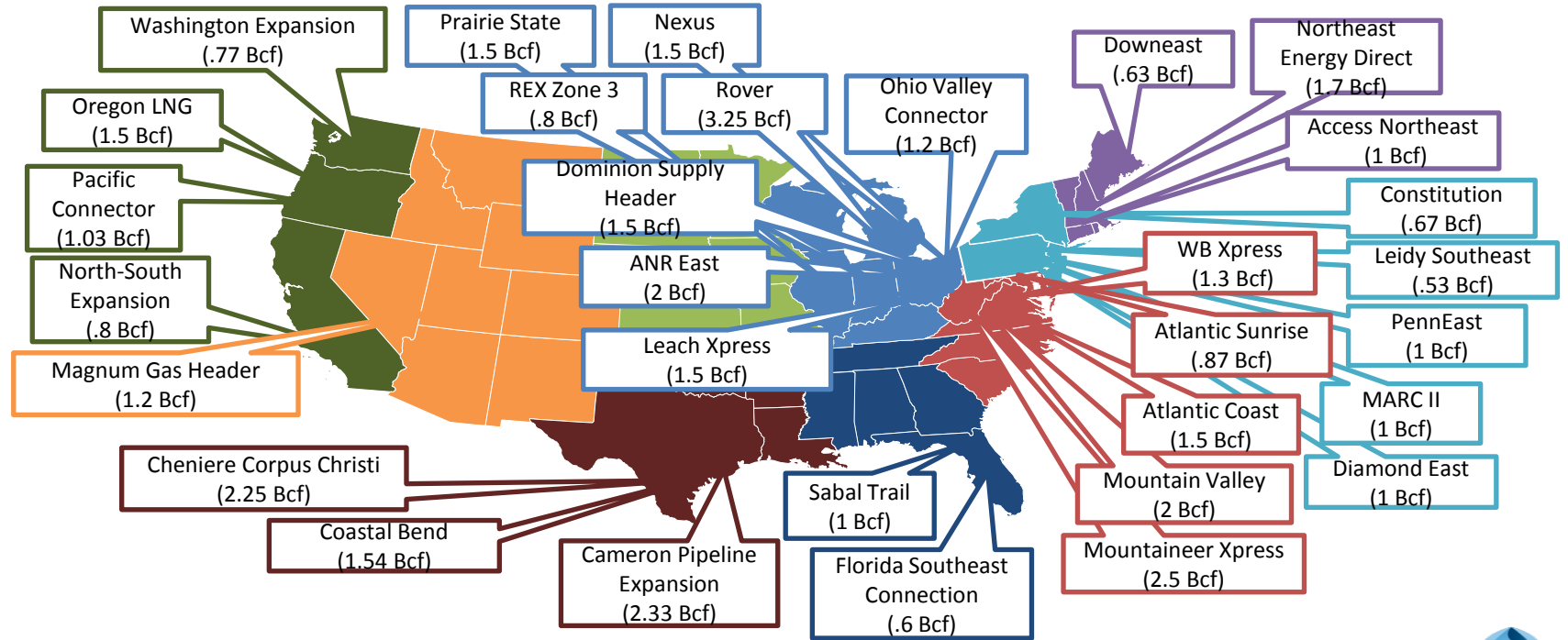


Source: EIA, Baker Hughes



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America's
Natural Gas
Alliance

Current Pipeline Projects (Lower 48 + >0.5 Bcf/d + >20 miles)



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