

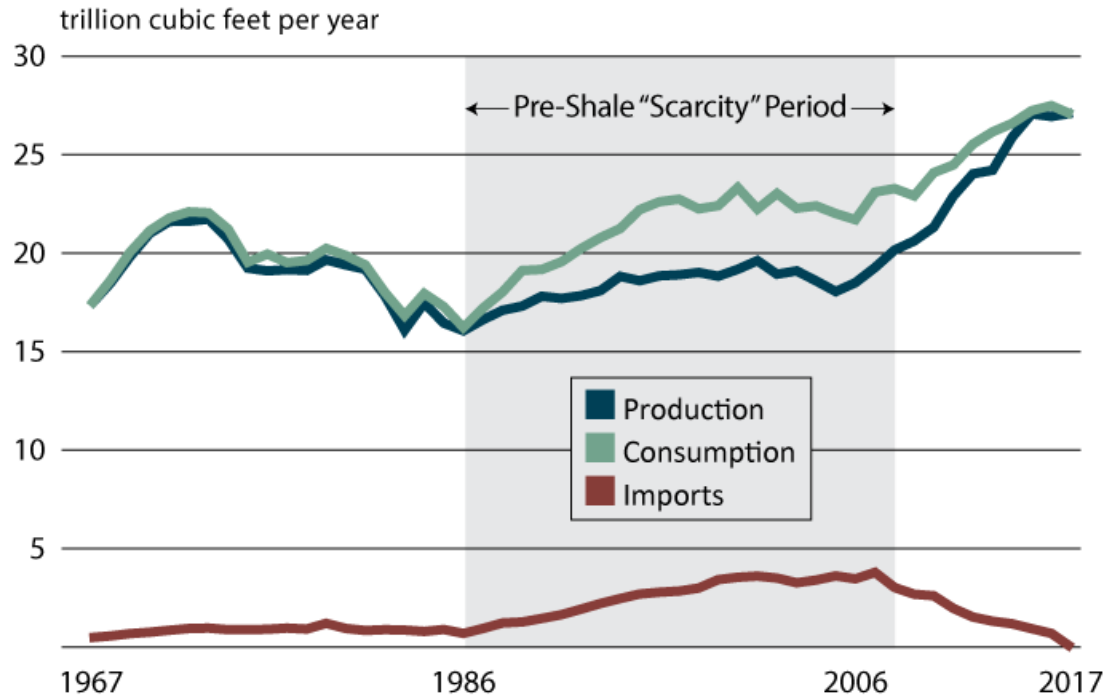
Introduction: the US LNG Export Industry

LNG Allies

23 May 2018



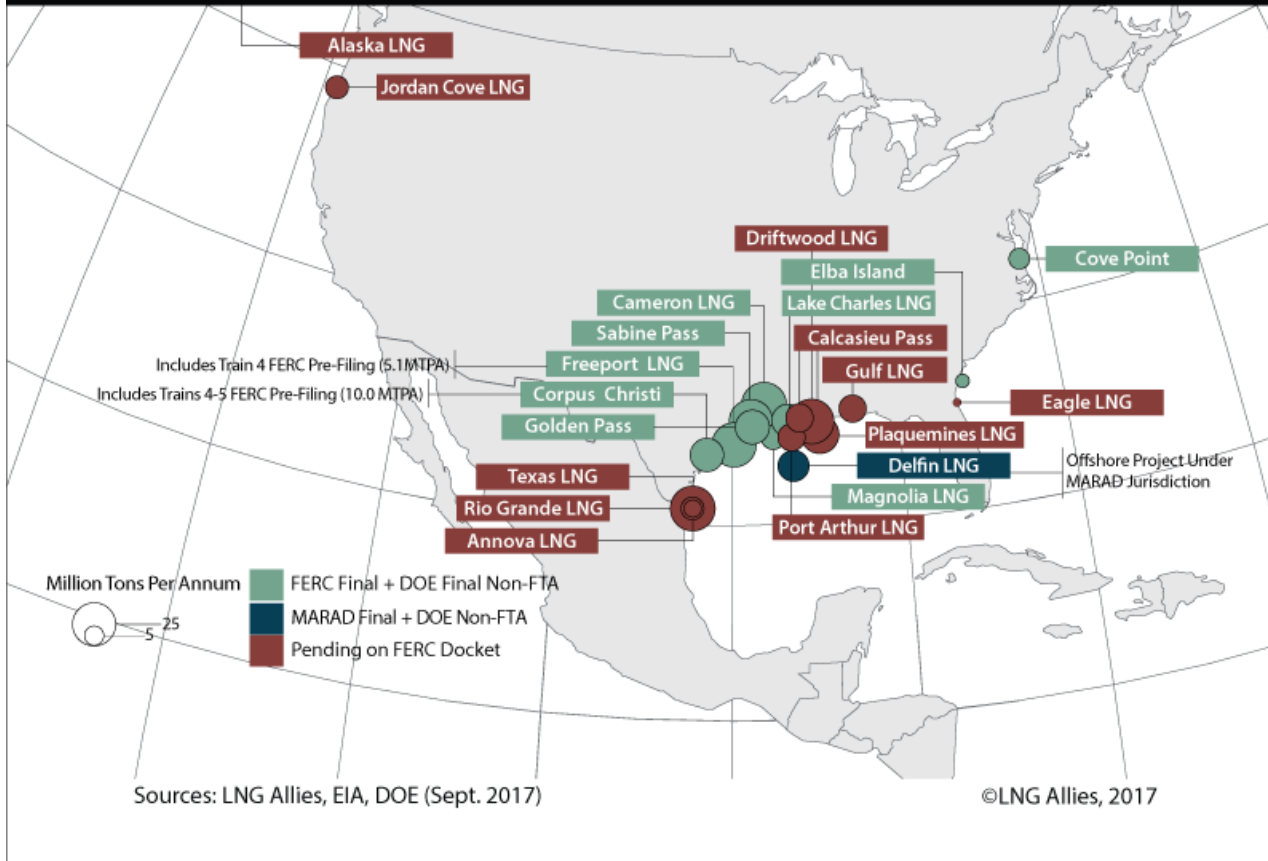
U.S. Natural Gas Production, Consumption, Imports



Source: EIA Annual Energy Outlook - 2018

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Major U.S. LNG Export Projects - Existing & Proposed



Permitting Status of U.S. LNG Export Projects

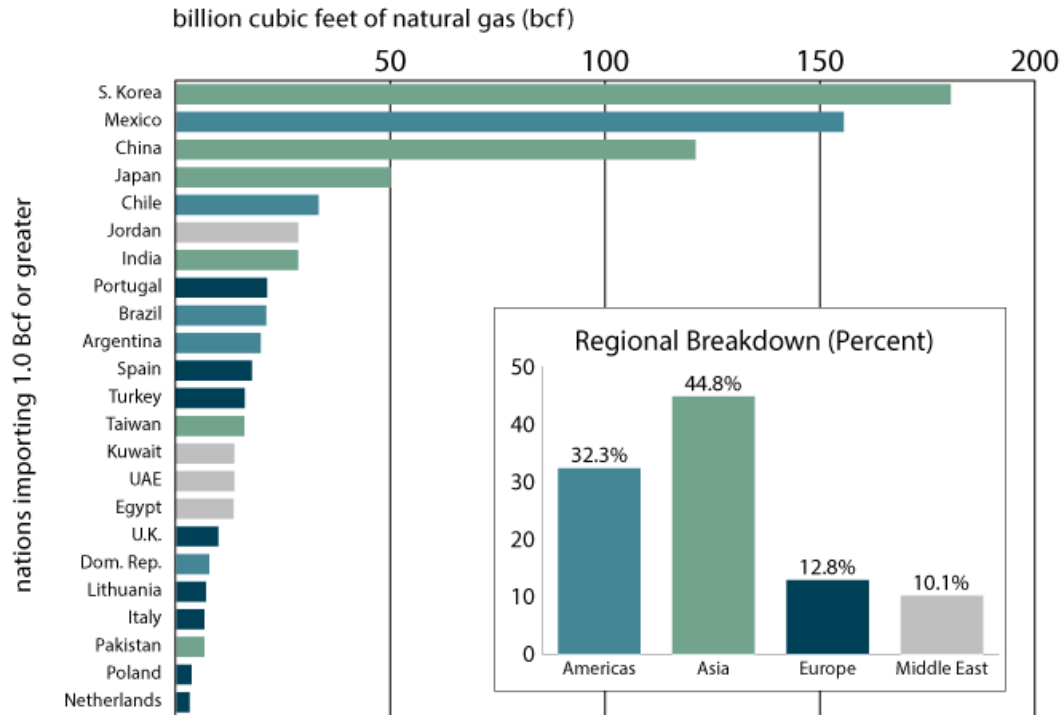
Project Stage	Projects	MTPA	Bcm/yr	Bcf/day
Operating / Under Construction	6	70.9	97.7	10.0
Fully Permitted (Major Projects)	4	68.9	95.0	9.7
Fully Permitted (Small Projects)	N/A	9.0	12.4	1.3
Formal FERC Review	11	146.9	202.6	20.9
FERC Pre-Filing	2	24.0	33.1	3.3
Total	23	310.7	428.5	44.0

Notes: (1) Projects = individual projects. (2) Additional trains for existing projects not included in the project count, but in the MTPA, Bcm/year, and Bcf/day totals (Sabine Pass #6, Corpus Christi #3, Cameron #4 #5, Freeport #4).

Source: Federal Energy Regulatory Commission & LNG Allies (17 April 2018)

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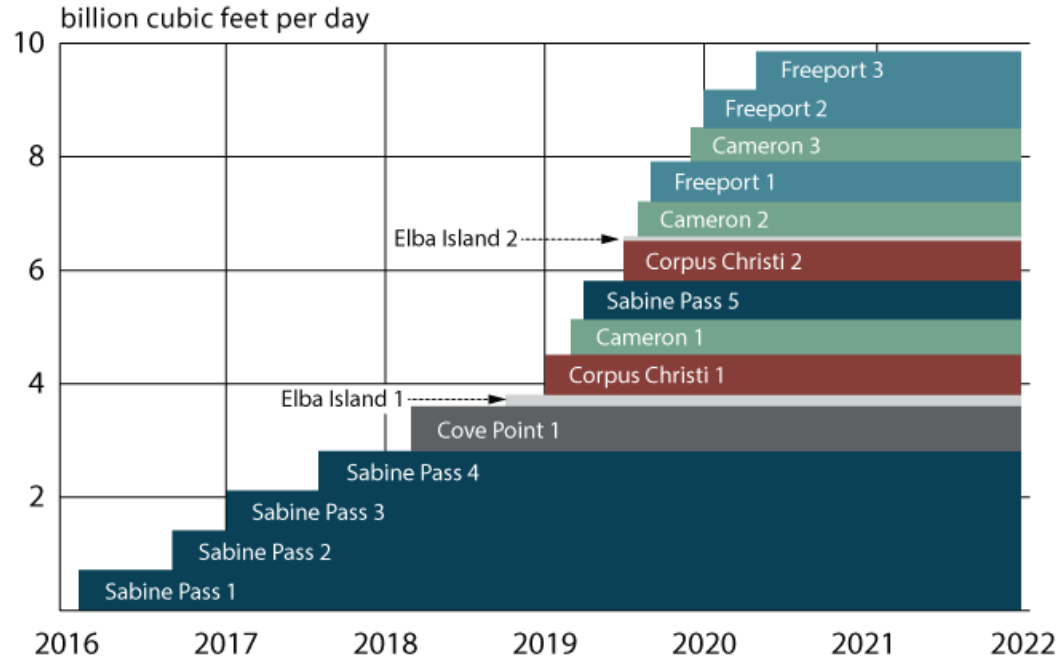
U.S. LNG Destinations Last 12 Months



Source: DOE LNG Monthly, May 2018 (data through Mar. 2018)

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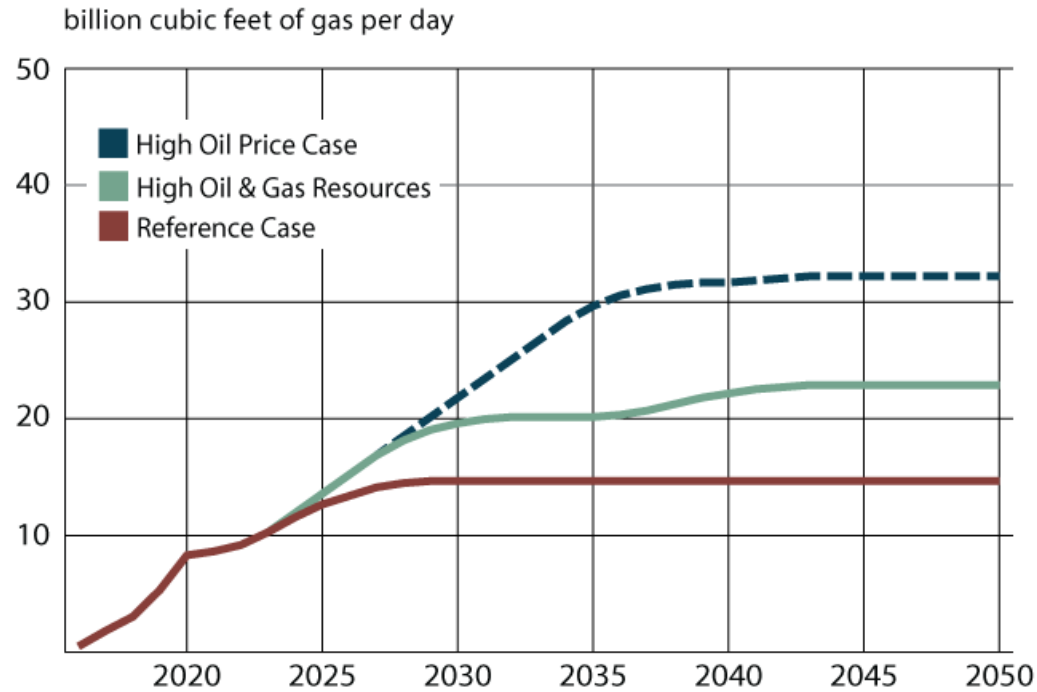
U.S. LNG Liquefaction Capacity Growth



Source: LNG Allies (Based on Trade Press & Company Data)

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U.S. LNG Exports



Source: EIA AEO-2018

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