Introduction: the US LNG Export Industry

LNG Allies

23 May 2018
<table>
<thead>
<tr>
<th>Project Stage</th>
<th>Projects</th>
<th>MTPA</th>
<th>Bcm/yr</th>
<th>Bcf/day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating / Under Construction</td>
<td>6</td>
<td>70.9</td>
<td>97.7</td>
<td>10.0</td>
</tr>
<tr>
<td>Fully Permitted (Major Projects)</td>
<td>4</td>
<td>68.9</td>
<td>95.0</td>
<td>9.7</td>
</tr>
<tr>
<td>Fully Permitted (Small Projects)</td>
<td>N/A</td>
<td>9.0</td>
<td>12.4</td>
<td>1.3</td>
</tr>
<tr>
<td>Formal FERC Review</td>
<td>11</td>
<td>146.9</td>
<td>202.6</td>
<td>20.9</td>
</tr>
<tr>
<td>FERC Pre-Filing</td>
<td>2</td>
<td>24.0</td>
<td>33.1</td>
<td>3.3</td>
</tr>
<tr>
<td>Total</td>
<td>23</td>
<td>310.7</td>
<td>428.5</td>
<td>44.0</td>
</tr>
</tbody>
</table>

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 #5, Corpus Christi #3, Cameron #4 #5, Freeport #4).

Source: Federal Energy Regulatory Commission & LNG Allies (17 April 2018) ©LNG Allies, 2018
U.S. LNG Destinations Last 12 Months

billion cubic feet of natural gas (bcf)

S. Korea
Mexico
China
Japan
Chile
Jordan
India
Portugal
Brazil
Argentina
Spain
Turkey
Taiwan
Kuwait
UAE
Egypt
U.K.
Lithuania
Italy
Pakistan
Poland
Netherlands

Source: DOE LNG Monthly, May 2018 (data through Mar. 2018) ©LNG Allies, 2018
U.S. LNG Exports

billion cubic feet of gas per day

High Oil Price Case
High Oil & Gas Resources
Reference Case

Source: EIA AEO-2018
©LNG Allies, 2018
www.Ingallies.com
@Ingallies