Natural Gas: Fueling a Manufacturing Renaissance

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New U.S. Competitive Advantage

Spot Price ($/MMBtu)

- Brent Crude Oil
- Henry Hub Natural Gas

Competitive Advantage

The Nation’s Stake in Natural Gas

- Energy security
- Consumer heating/power
- Economic growth
- Strong manufacturing sector
- Plentiful, high-paying jobs
- Catalyst for innovation

>$80 billion in investments

Dow Energy Facts

- One of the world’s largest industrial consumers of energy and raw materials
- Consumes the equivalent of 850,000 barrels of oil daily
- Wide expertise in using and conserving energy
High & Volatile Gas Prices Mean Fewer Jobs

Not a Small Drop in the Bucket

- New manufacturing jobs
- Greater national energy security
- Stronger economic growth
- Increase exports of value-added products
- Billions of dollars in new investments
- Lower utility bills, more cash to spend

North American Shale Gas

500,000 new jobs in the U.S. alone
Create the Most Economic Growth

Manufacturing 1 X 8 X
Fuel 1 X 1 X
Exports 1 X 1 X

Full Demand Growth Potential

Natural Gas Consumption Bcf/d

Source: *EIA Annual Energy Outlook 2012, Dow*
The Future Is Bright

- Limited Supply
- Accelerated Demand

- Environmental Concerns
- Regulation
- Infrastructure
- Industry
- Electric Power
- Transportation
- LNG Exports

Thank you.