

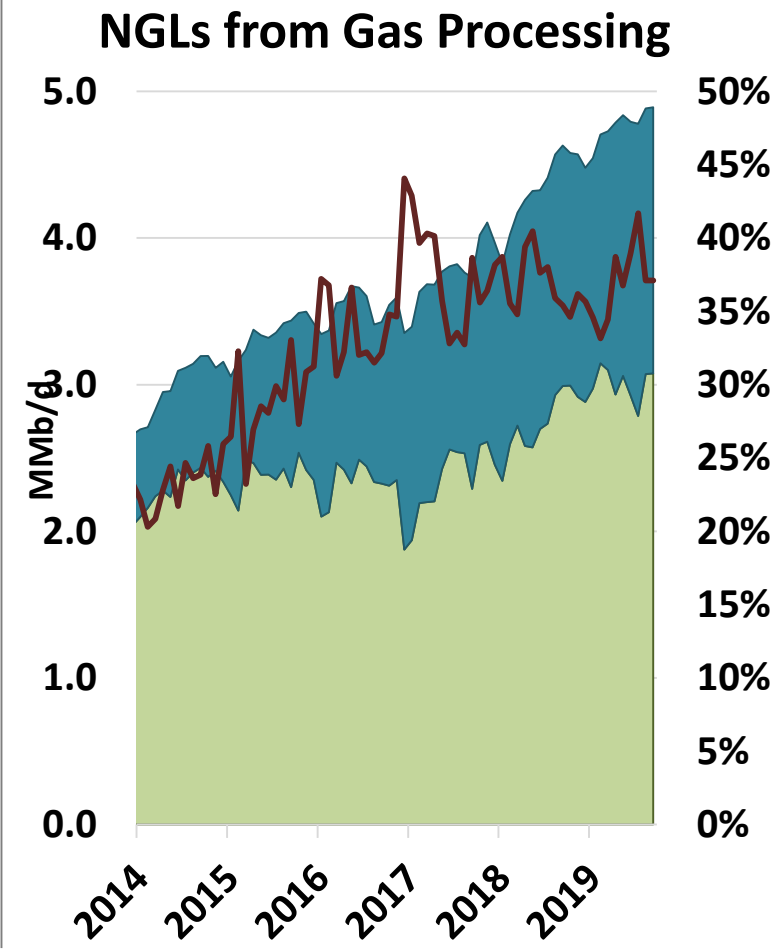
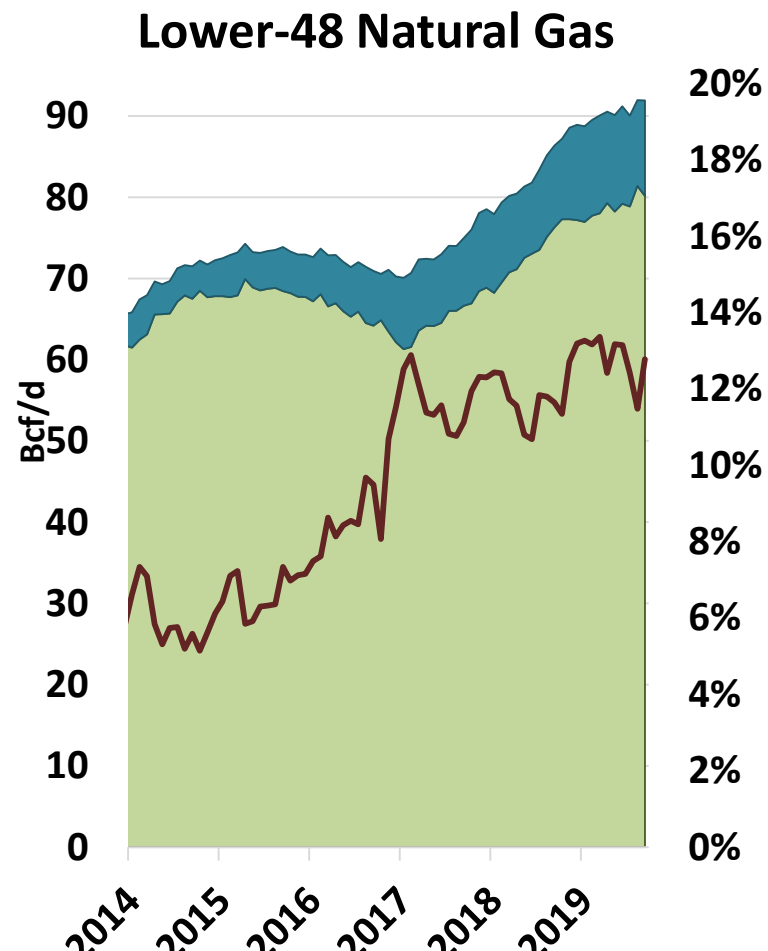
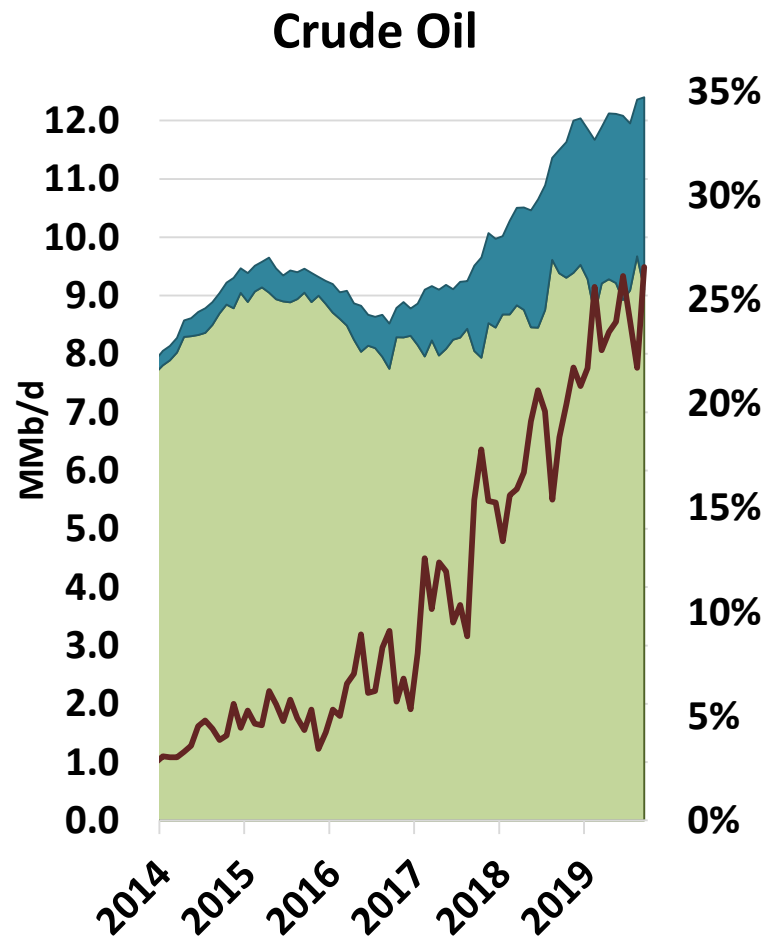
Permian Basin Natural Gas Where Is It All Going to Go?



PERMIAN BASIN
PETROLEUM ASSOCIATION

October 24, 2018

Crude/Gas/NGL Production, Exports, and % Exports

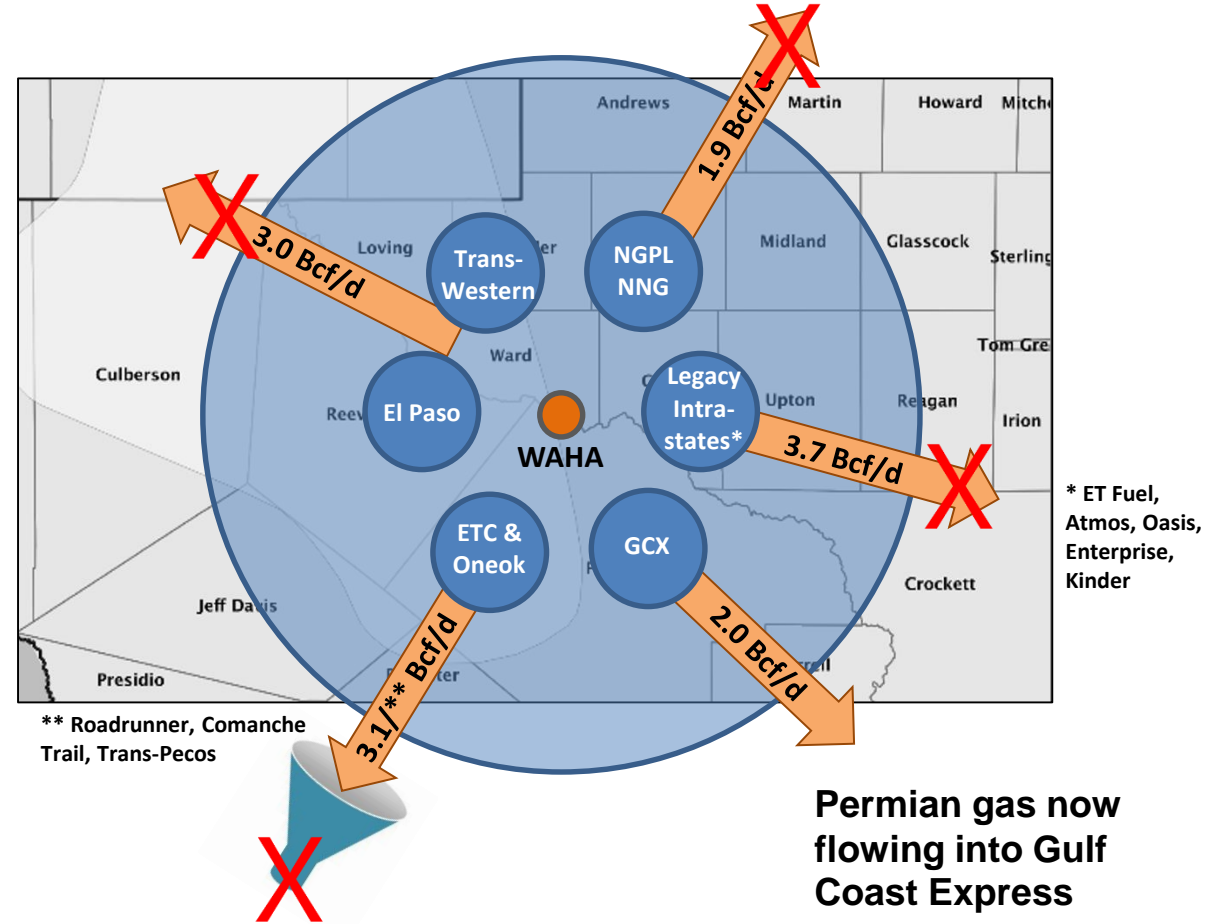
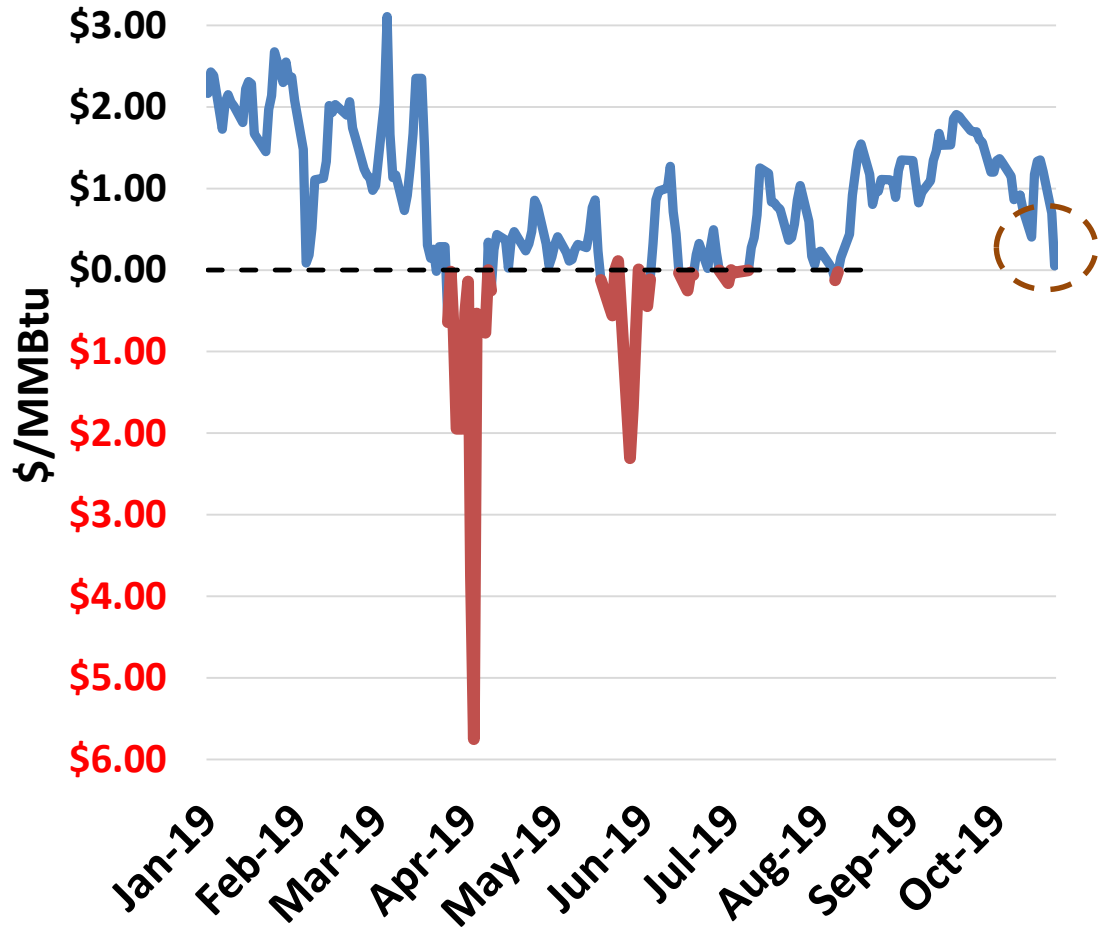


Production to U.S. Markets Production to International Markets Percentage Exports



Permian Gas Takeaway Capacity & Price

Waha Hub Daily Average Price

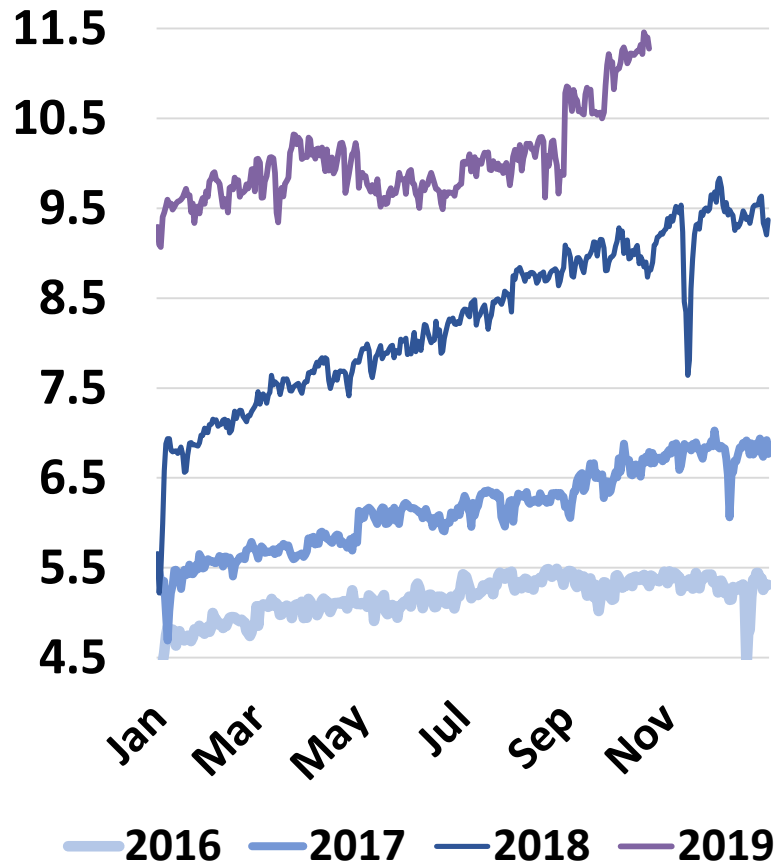


* ET Fuel, Atmos, Oasis, Enterprise, Kinder

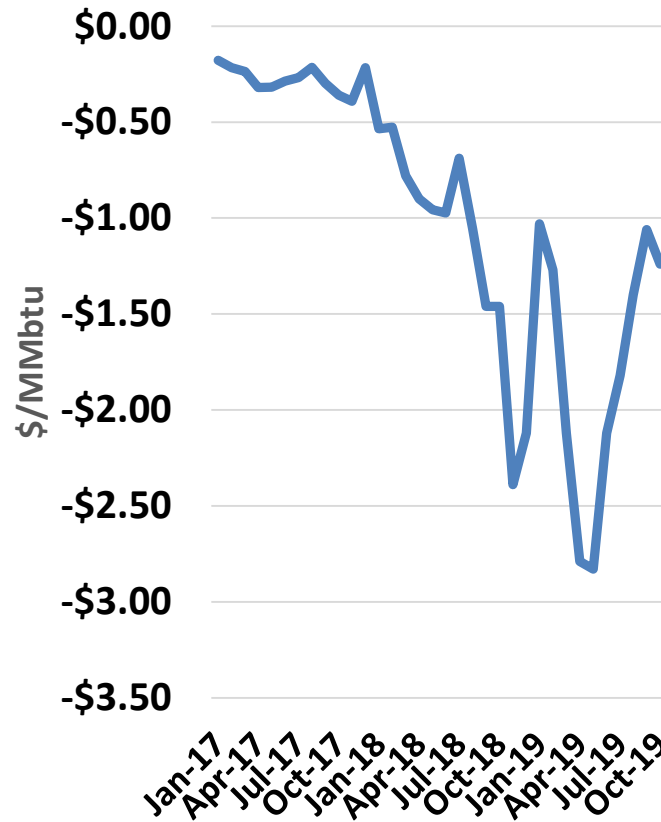
** Roadrunner, Comanche Trail, Trans-Pecos

Permian Gas Production and Pricing

Permian Gas Production



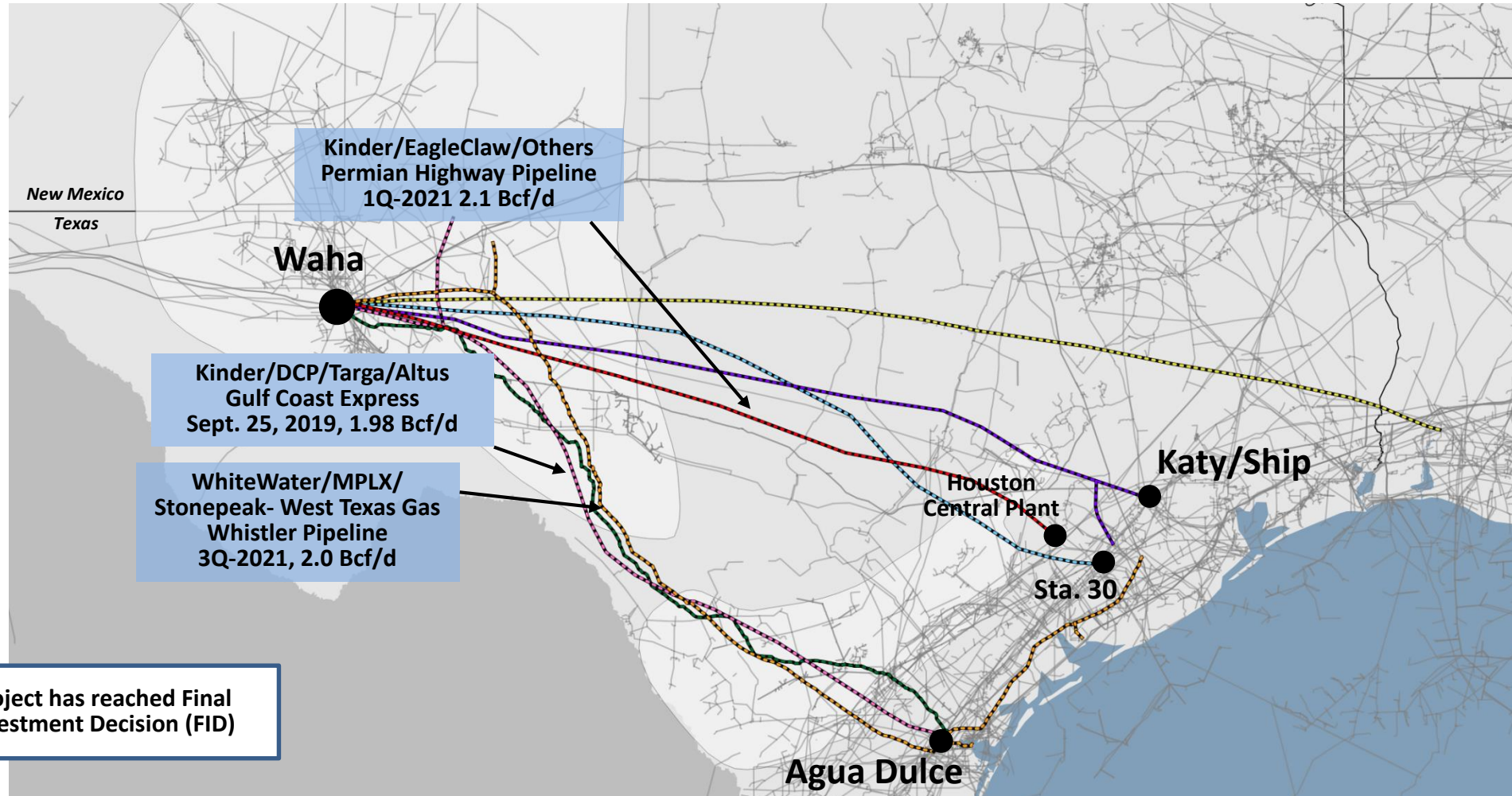
Waha Basis



Waha Forward Basis

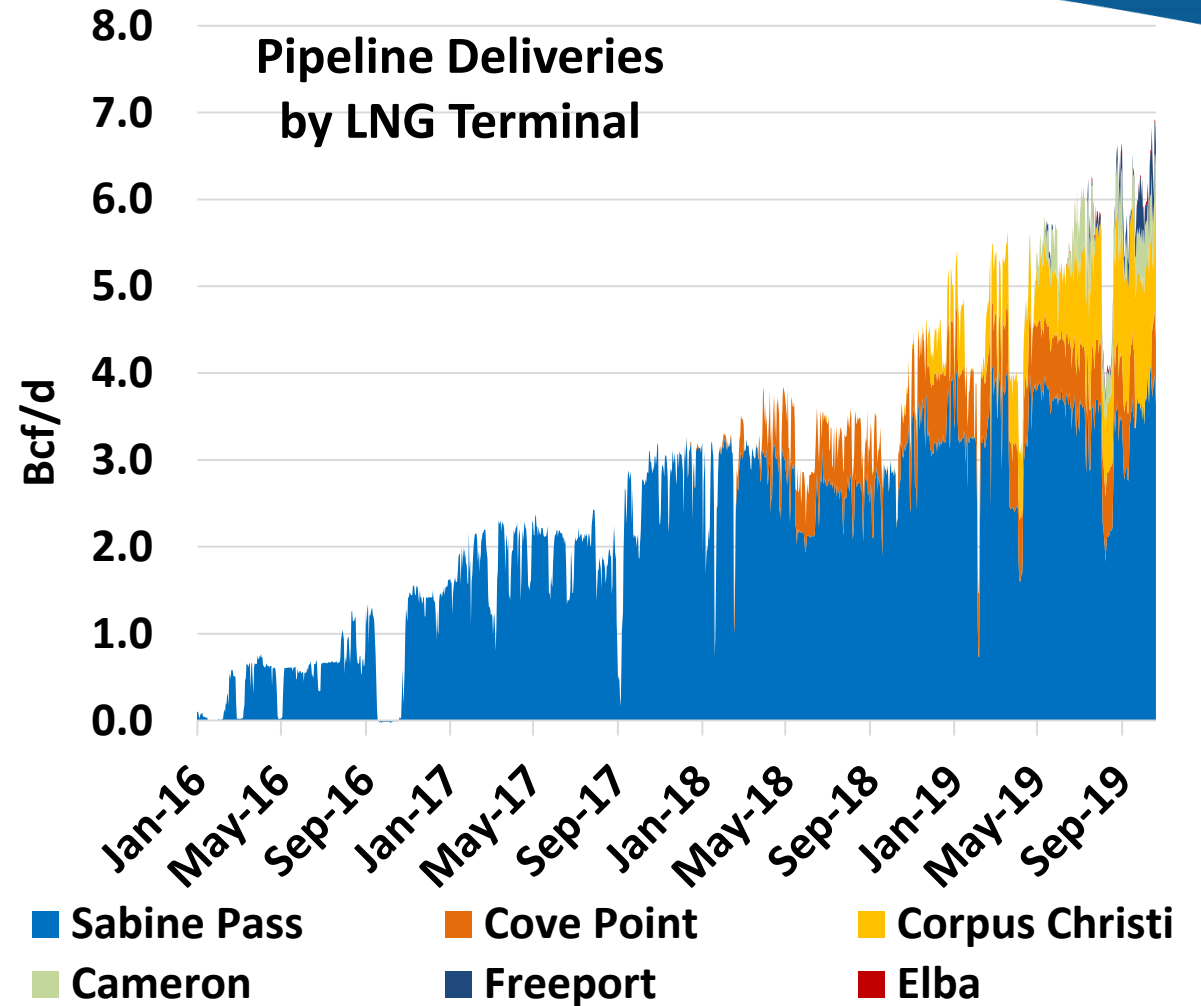
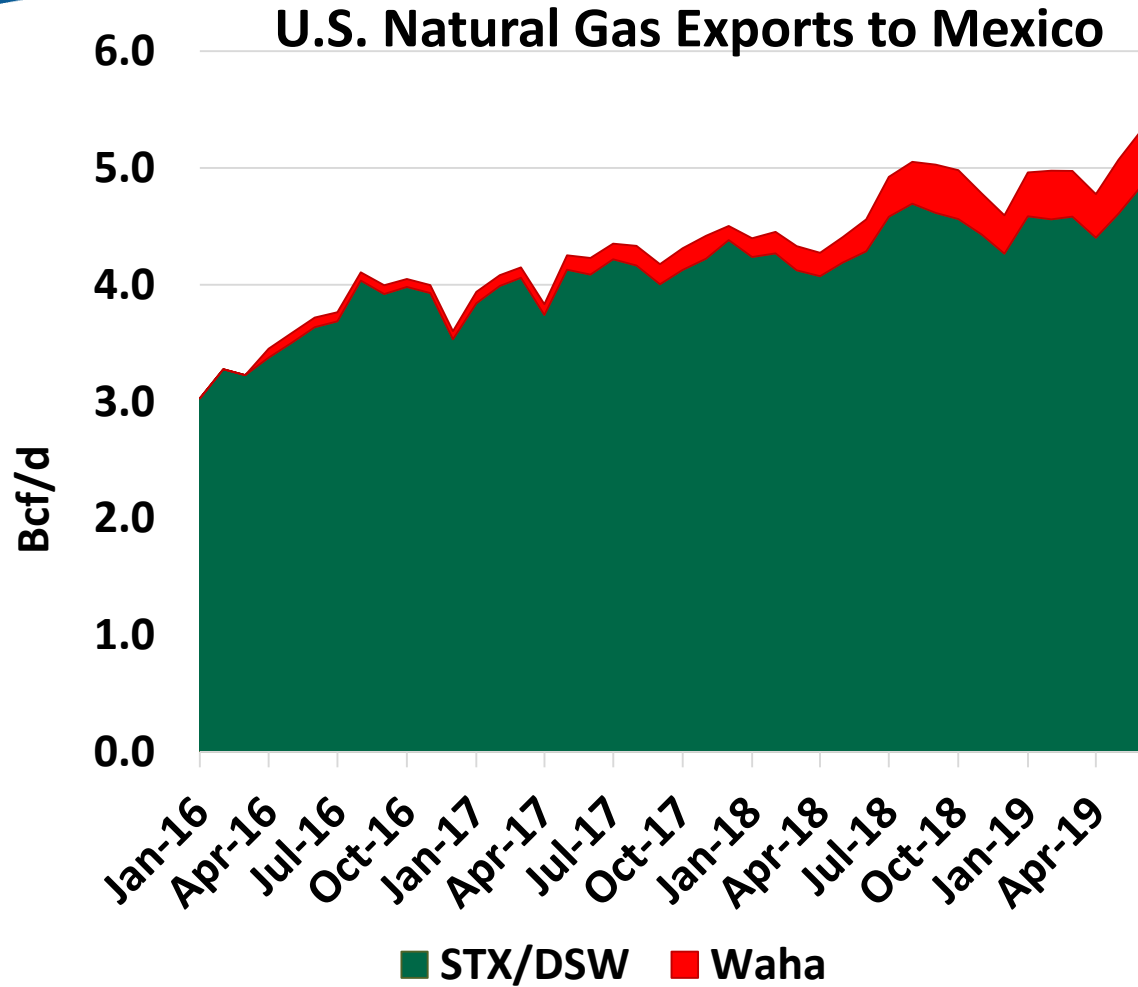


Permian Natural Gas Pipeline Projects



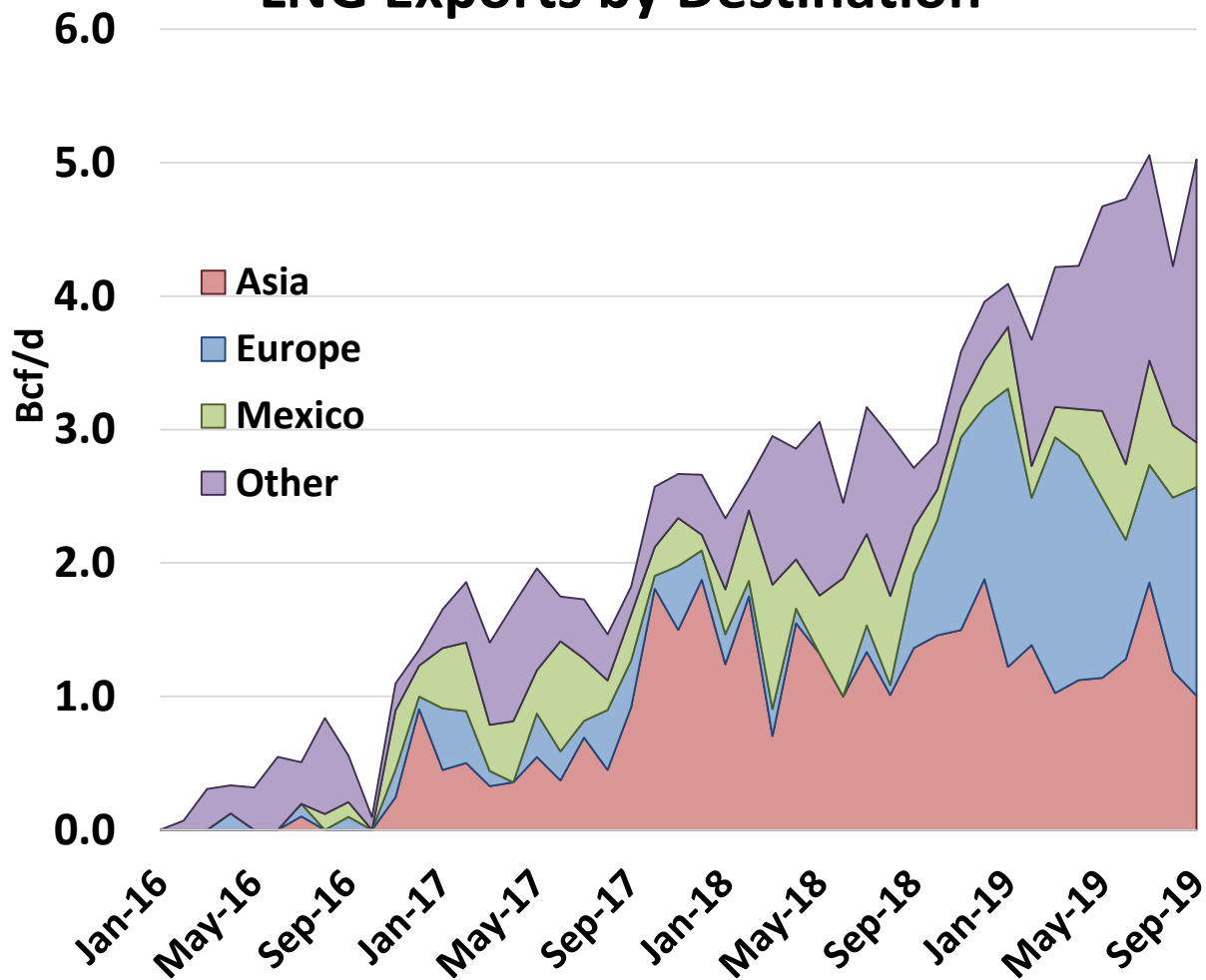
Project has reached Final Investment Decision (FID)

Exports: LNG and Pipeline to Mexico

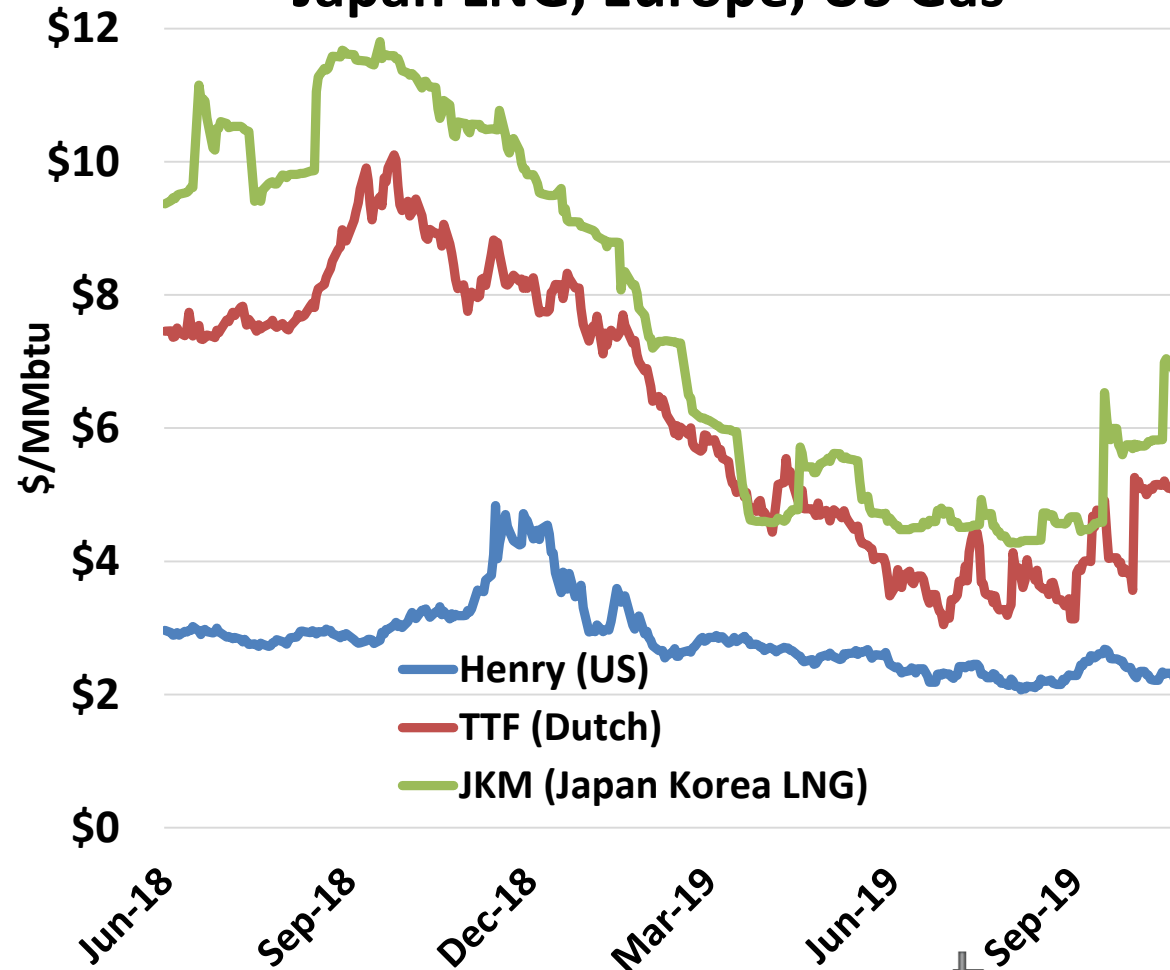


U.S. LNG Destinations & Global LNG Prices

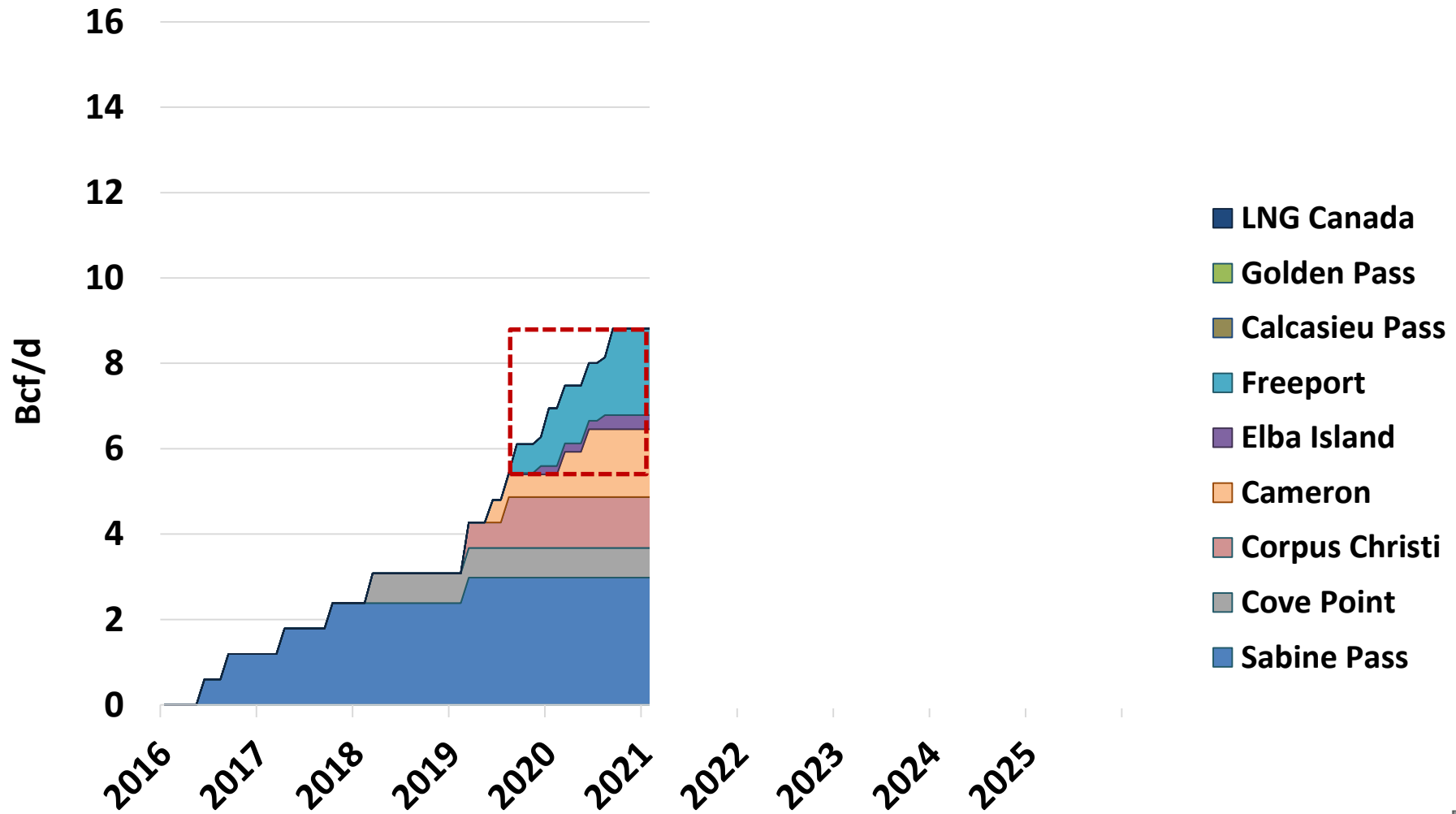
LNG Exports by Destination



Japan LNG, Europe, US Gas

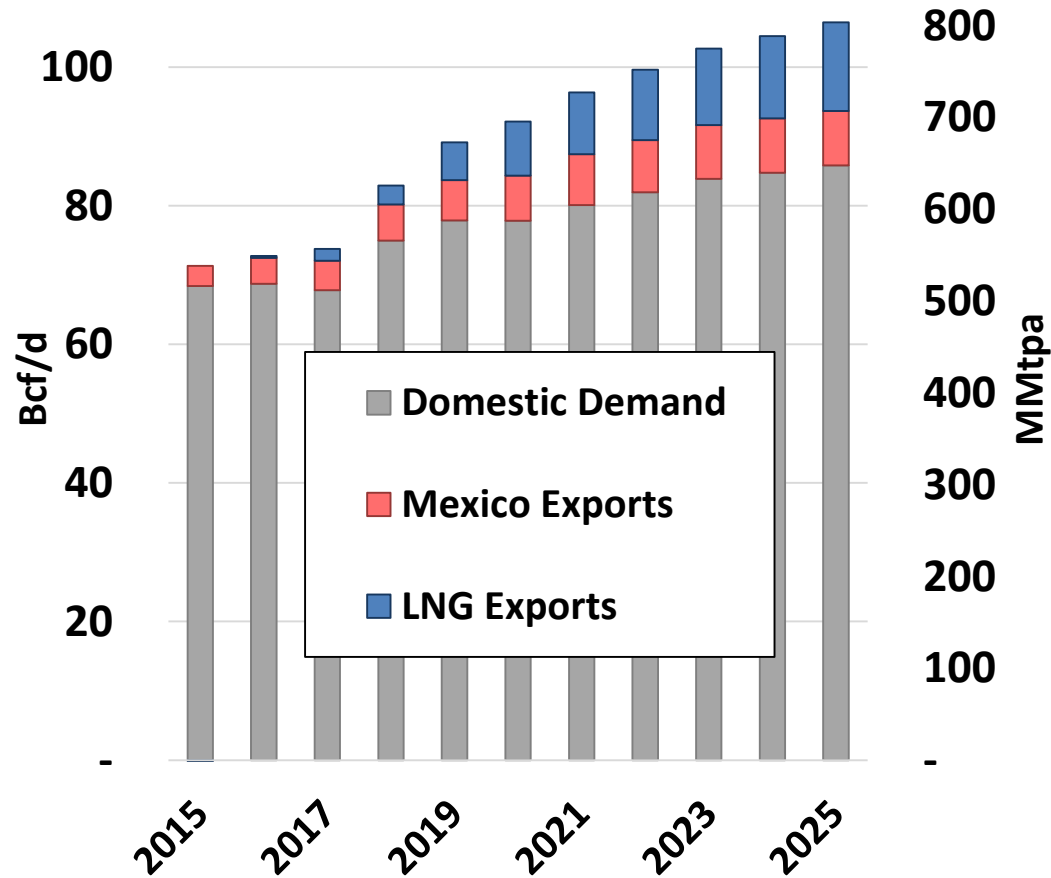


LNG Timing: Buildup of Export Capacity (2016-25)

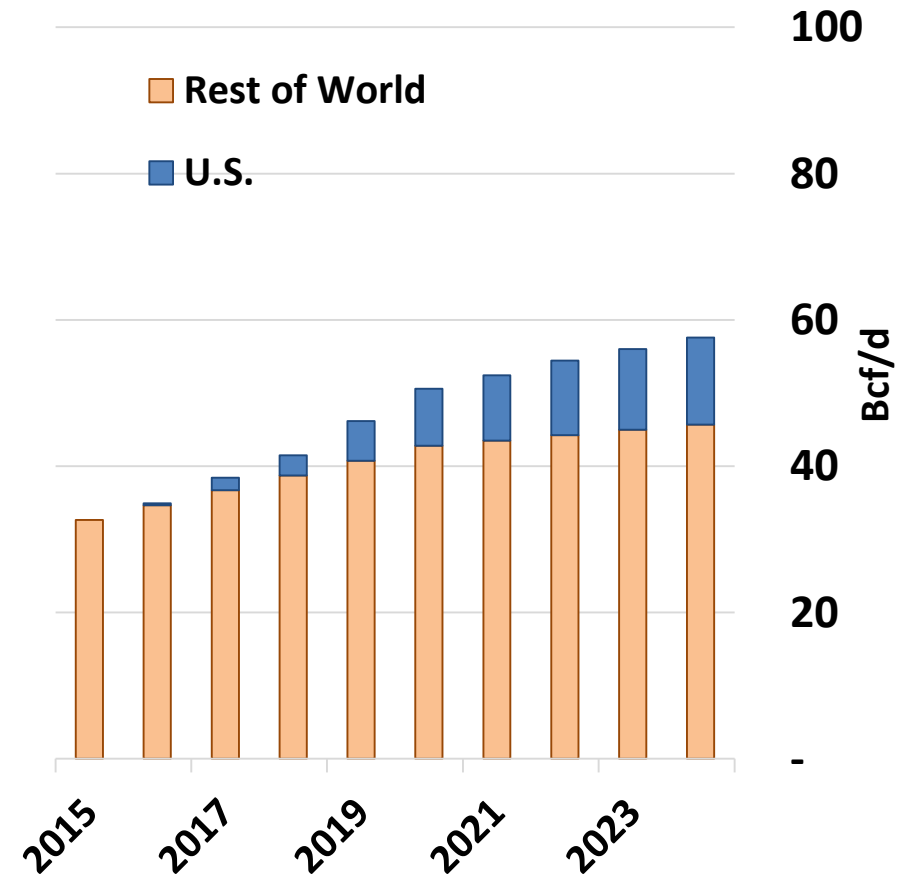


U.S. Natural Gas Demand; Global LNG Supply

U.S. Gas Demand

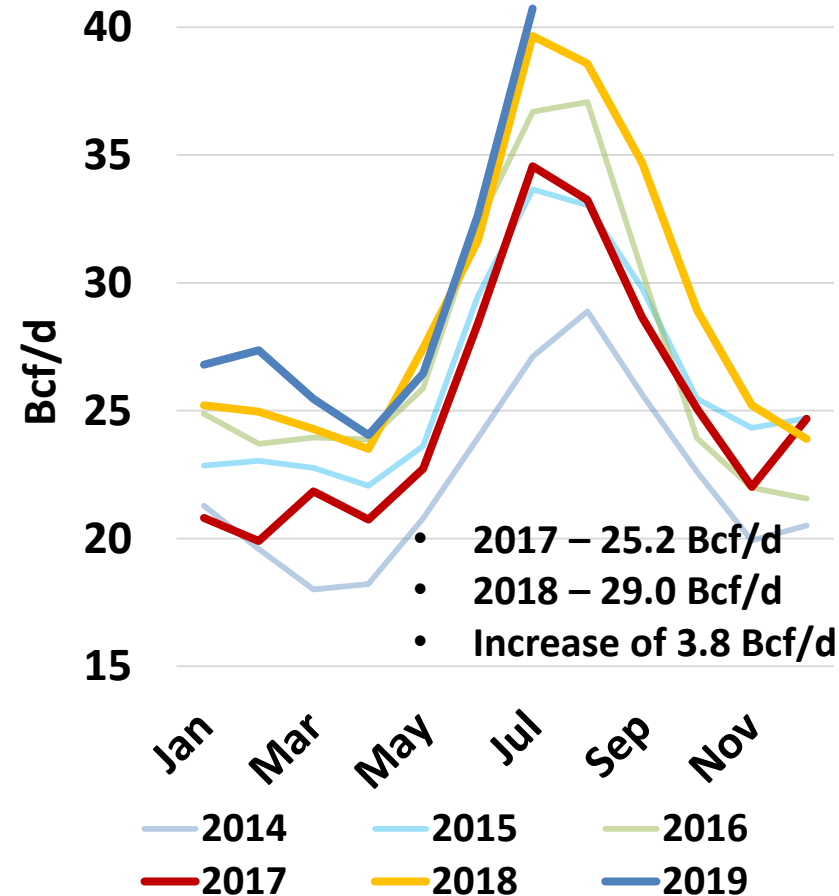


Global LNG Supply

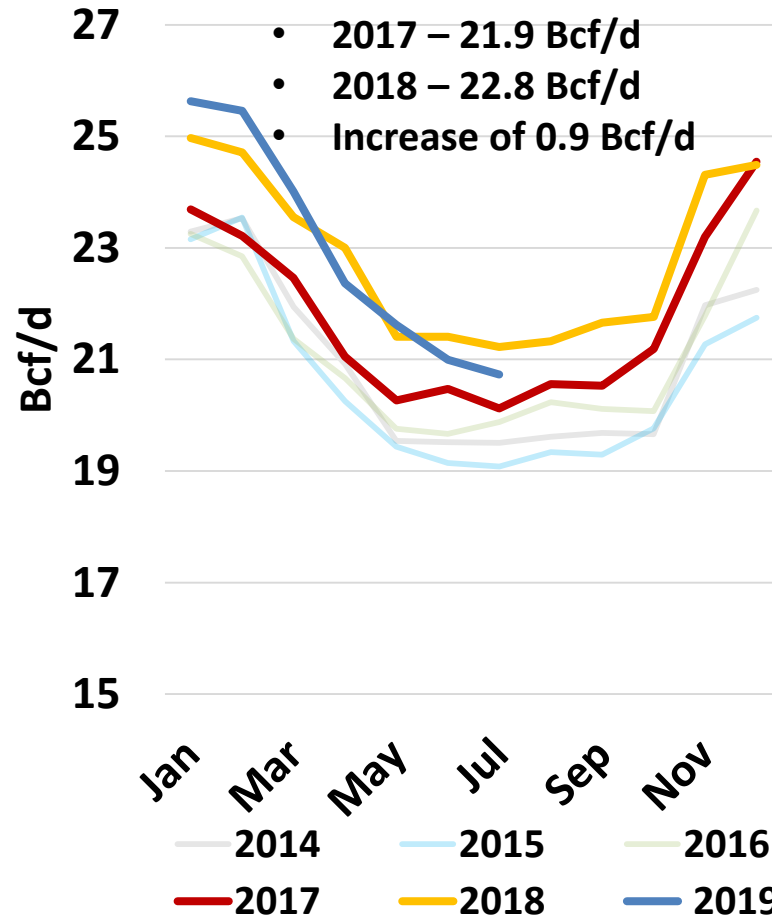


Lower 48 Natural Gas Consumption

Power



Industrial



Res/Comm

