

Strategic Thinking for the Future

October 17, 2014

Panel Introduction

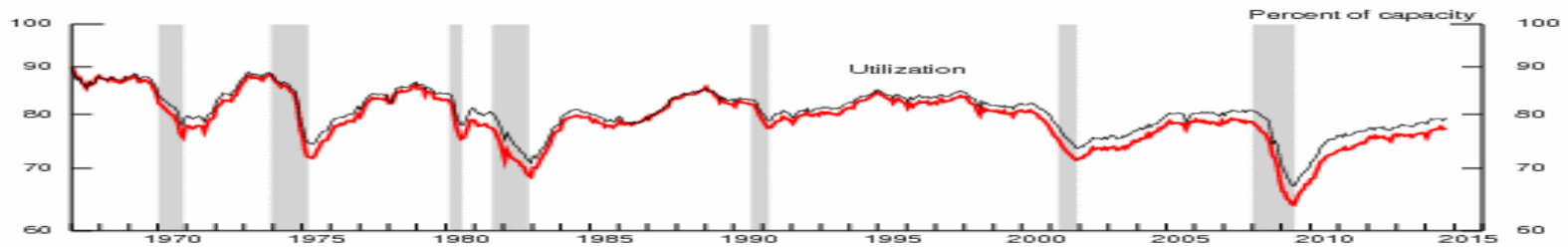
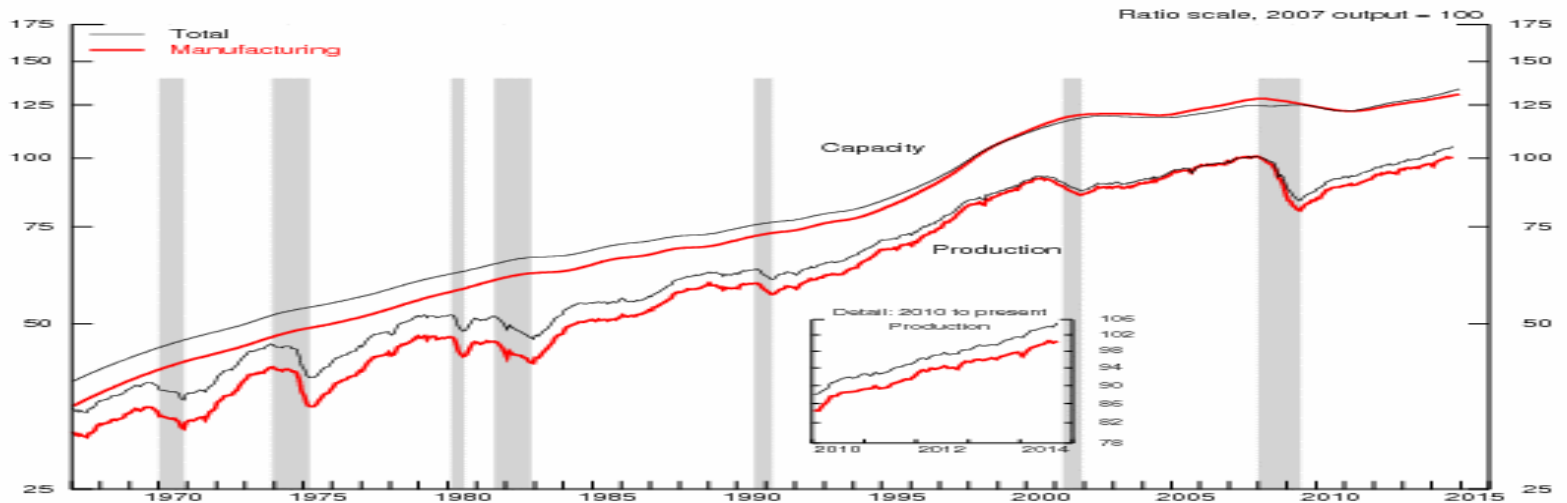
- > Ann McIver - Citizens Thermal
- > Doug Irvin - Darling International
- > Paul Kempf - The University of Notre Dame
- > Leslie Vigna Witherspoon - Solar Turbines

CIBO's Strategic Planning

- > Day long strategic planning session in 2013 (Oveo Solutions) - approximately 20 members involved
- > CIBO Board met to review Oveo report
- > Lots of new ideas and evolving trends to consider and digest
 - ❖ Solid fuels to gas
 - ❖ Renewables
 - ❖ Domestic manufacturing growth, new industries
 - ❖ New, more numerous/diverse and more active external stakeholders
- > Need more member input (and help!)

US Industrial Production

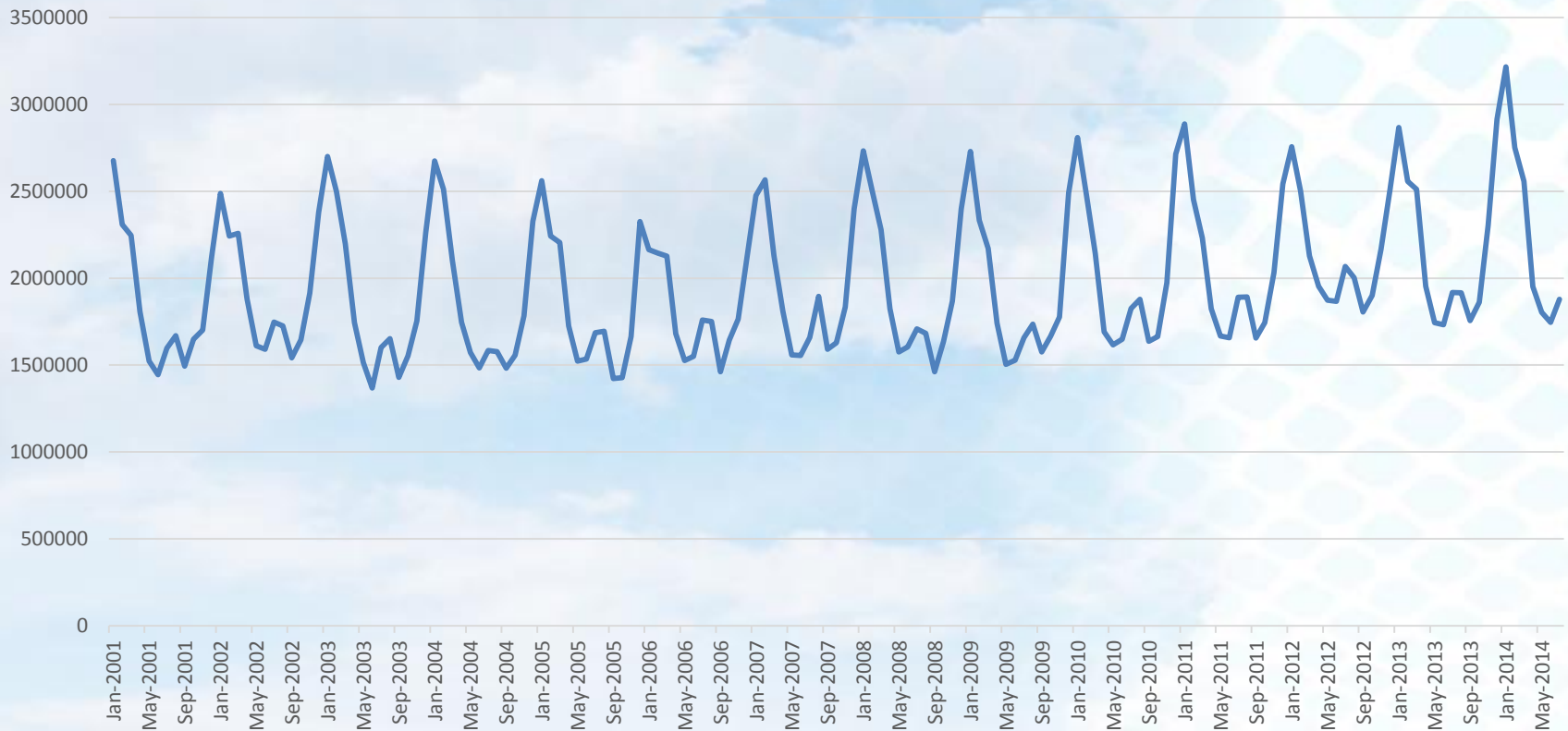
1. Industrial production, capacity, and utilization



Note: The shaded areas are periods of business recession as defined by the National Bureau of Economic Research (NBER).

US Natural Gas Consumption

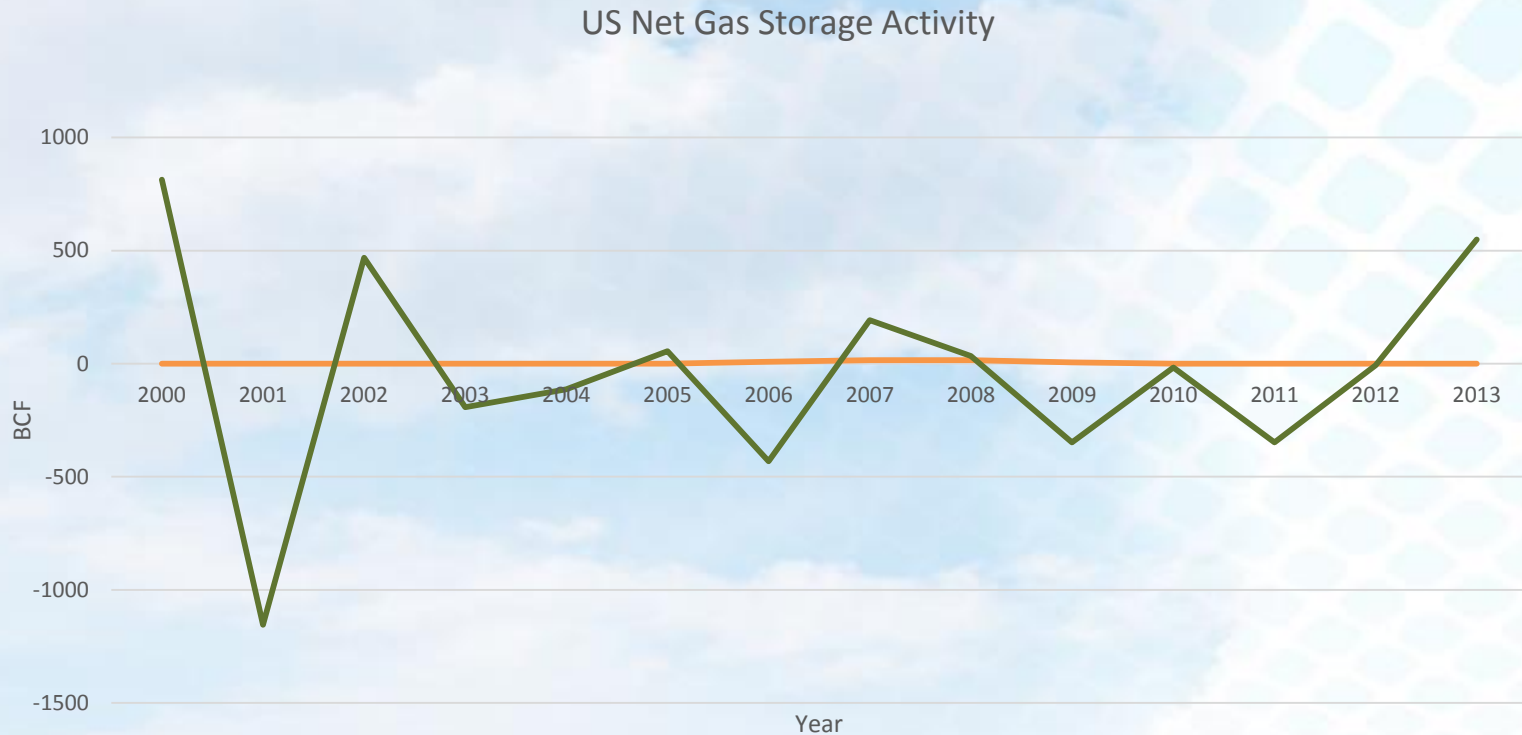
U.S. Natural Gas Total Consumption (MMcf)



Top Month Consumption (MMcf) since Jan 2001

Jan-2014	3216936
Dec-2013	2914581
Jan-2011	2888640
Jan-2013	2866938
Jan-2010	2809788
Jan-2012	2757086
Feb-2014	2751553
Jan-2008	2733970
Jan-2009	2729715
Dec-2010	2714054
Jan-2003	2700545
Jan-2001	2676998
Jan-2004	2675834
Feb-2007	2566993
Jan-2005	2561858
Feb-2013	2558479
Mar-2014	2557807

Domestic Natural Gas Storage (withdrawals minus injections)



Marcellus/Utica Natural Gas Pipeline Projects

- > Marcellus/Utica Gas (moving to ---)
- > Northeast - 24 active projects
- > Midwest - 10 active projects
- > Southeast - 23 active project