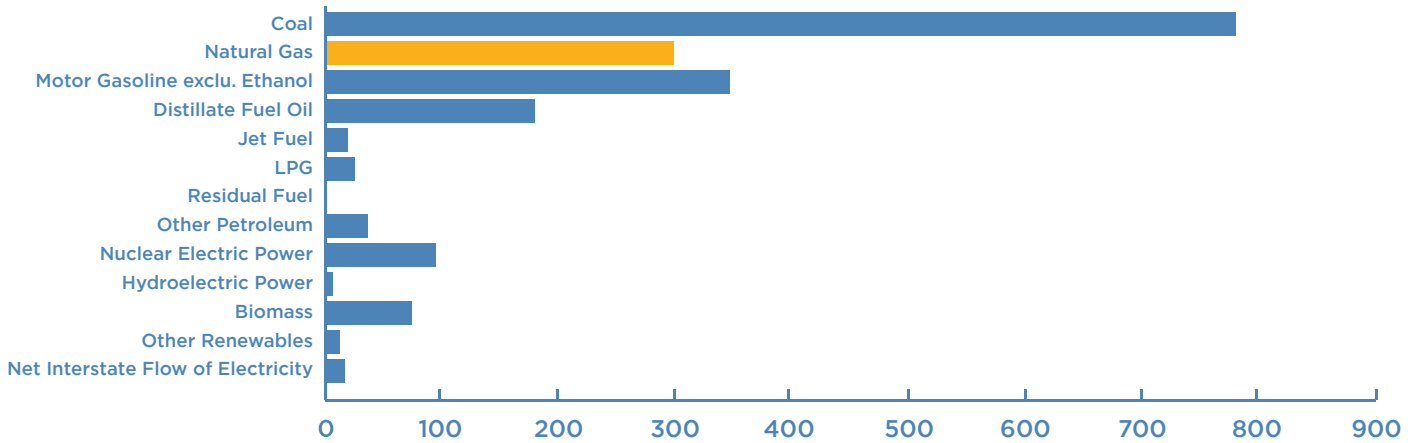


MISSOURI



The U.S. oil and natural gas industry provides energy security and economic benefits to our nation, supporting more than 9.8 million jobs and contributing \$1.2 trillion in added value to the economy.

MISSOURI ENERGY IS ALL OF THE ABOVE



U.S. ENERGY INFORMATION ADMINISTRATION CONSUMPTION ESTIMATES, 2014
Trillion Btu



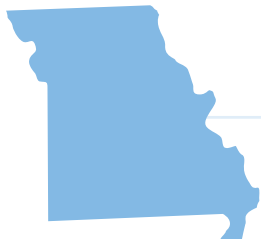
FOCUS: INFRASTRUCTURE

“You can talk about Missouri as a pass-through for Canadian oil. But you don’t get from start to finish without the critical middle part. That’s where Missouri serves us in our pipeline system.”

Mike Moeller, Enbridge Senior Director – Mid Continent Region



MISSOURI ENERGY OVERVIEW



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The number of interstate pipelines crossing Missouri, carrying natural gas to Midwestern and Eastern states.

Due to its location in the heart of the country, Missouri serves as a major transportation hub for oil and natural gas pipelines. Several major crude oil pipelines pass through the state on their way to refining centers elsewhere in the Midwest. Among the natural gas pipelines traversing the state is the Rockies Express Pipeline (REX), which serves the state and is one of the largest natural gas pipelines in the nation. The potential for unconventional oil and gas resources in Missouri has an estimated economic value of hundreds of billions of dollars.



THE IMPACTS OF ENERGY POLICY CHOICES

Oil and natural gas innovations and investments have moved the U.S. from an era of energy scarcity to one of energy abundance in a few short years. Washington can make energy policy choices that will either continue or hinder America's energy renaissance.

POTENTIAL IMPACT ON U.S. (BY 2035)	MORE	
	PRO-ENERGY POLICIES	REGULATORY CONSTRAINTS
Oil & Natural Gas Production	+8.0 MMboed	-3.4 MMboed
Total Jobs supported	+2.3 million	-830 thousand
GDP / Year	+\$443 billion	-\$133 billion
Total Government Revenue / Year	+\$122 billion	-\$18 billion
Cumulative Government Revenue from 2016	+\$1.08 trillion	-\$500 billion
Total Household Income / Year	+\$118 billion	-\$43 billion
Average Household Energy Expense	-\$360 per year	+\$242 per year

Source: <http://www.api.org/-/media/Files/Policy/Jobs/Wood-Mackenzie-Report-2015.pdf>
MMboed = Million Barrel Oil Equivalent Per Day

LESS



FOCUS: INFRASTRUCTURE

"We come to work every day to find better ways to serve our customers, such as negotiating the best possible price for natural gas. They can trust that we will do everything possible to keep natural gas rates stable and affordable. This year abundant supplies of natural gas and warmer temperatures in our area are helping to keep natural gas costs lower."

Steve Lindsey, Laclede Gas president

