



AMERICAN PETROLEUM INSTITUTE

American Petroleum Institute
Market Development Committee Meeting
Thursday, March 17, 2016
1:00 pm Eastern – 4:00 pm Eastern
Smithson Room, Four Seasons Georgetown

I.	Welcome	Steve Mueller, Chair
II.	Governance	
	a. Antitrust Statement	Erik Baptist (OGC)
	b. Committee Charter Approval	Steve Mueller
	c. Market Segment/Issue Review	Marty Durbin
	d. API Integration	Marty Durbin
III.	Clean Power Plan/ Power Generation	
	a. IPM Modeling Results	Amy Farrell (Mkt. Dev)
	b. Message Integration	Linda Rozett (Comms)
	c. State Engagement	Rolf Hanson (State)
	d. Power Generation Markets	Sari Fink (Mkt. Dev.)
IV.	Northeast Infrastructure Campaign	
	a. Overview	Brett Barrus (Mkt. Dev.)
	b. Midstream Coordination	Robin Rorick (Midstream)
	c. Coalition Activity	Deryck Spooner (Mobilization)
V.	Exports And Transportation	
	a. Overview	Amy Farrell
VI.	Upcoming Committee Meetings	
	a. TBD (June/Sept)	MDC Conference Calls
	b. November 11, 2016 1:00pm – 4:00pm ET	MDC Meeting (Amelia Island, FL)
VII.	Other Business	

API Antitrust Guidelines for Committees

Participants should observe the following guidelines:

Meetings and Gatherings

- ✓ These guidelines apply to any meeting or gathering of competitors, so they apply not only at API meetings but also at meetings with other trade associations or government representatives; and at gatherings, such as Committee dinners that may follow a meeting.
- ✓ Avoid any discussions or conduct that might violate the antitrust laws or even raise an appearance of impropriety.
- ✓ At meetings, limit discussions and materials to agenda topics (unless additional topics and materials have been approved by counsel).
- ✓ Discontinue the discussion and consult with counsel whenever questions regarding antitrust compliance arise.
- ✓ Do not stay at a meeting, or any other gathering, if discussions mentioned below are taking place.

Information

- ✓ No discussion or sharing of any company's confidential or proprietary information;
- ✓ No discussion or agreements, either explicit or implicit, regarding prices of particular products or services of a company;
- ✓ No forecasting of prices for goods or services;
- ✓ No discussion of any company's purchasing plans for particular products or services;
- ✓ No discussion of any company's specific merger/divestment plans, market allocation, development plans, inventories and costs (only publicly available information should be discussed or shared);
- ✓ No sharing or discussion of specific company compliance costs, unless information is publicly available;
- ✓ Do not share information that your company considers to be confidential or sensitive, even if that information does not fit in any other category above.
- ✓ Any discussion regarding potential energy or economic scenarios that may arise must be limited to generalities. There should be no discussion of how individual companies intend to respond to potential economic scenarios or government action.

Vendors and Products

- ✓ There shall be no agreement or discussion regarding the purchase or sale of a product or service— purchasing and selling decisions are independent company decisions.
- ✓ There shall be no agreement by all companies to use a product/service or that one product/service is preferred.
- ✓ There shall be no agreement by all companies not to use a product/service or that one product/service is not preferred.
- ✓ Individual companies may share fact-based experiences but should not make explicit recommendations for or denunciations of a vendor at API meetings.
- ✓ All discussions related to vendor products and services must be grounded in facts.
 - Do not make disparaging remarks about vendors.
 - Do not make subjective comments if there is no factual basis. Example, "That company/vendor is stupid. They don't know what they're doing."
 - You may share information based on facts.
Examples:
 - ❖ "We tried this product and it did not work"
 - ❖ "We were not satisfied because ____."
 - ❖ "We tried x product/service and were very pleased with the quality of the product."

2016 API Board of Directors Meeting: Schedule of Events

Wednesday, March 16, 2016

<u>Time</u>	<u>Event</u>	<u>Area/Room</u>
1:30 pm – 5:30 pm	Registration	Seasons Foyer
2:00 pm – 3:00 pm	API PAC Board Meeting	George Washington
3:15 pm – 4:15 pm	General Membership Committee	George Washington
4:30 pm – 5:30 pm	Finance Committee	George Washington
5:30 pm – 6:30 pm	Chairman's Reception	Seasons
7:00 pm – 9:00 pm	Chairman's Dinner	Seasons

Thursday, March 17, 2016

<u>Time</u>	<u>Event</u>	<u>Area/Room</u>
6:00 am – 10:00 am	Registration	Conference Level Foyer
6:45 am	Executive Committee Breakfast	Batch Room
7:30 am – 9:45 am	Executive Committee Meeting	Smithson Room
8:30 am – 10:00 am	Executive Forum / Breakfast	Douglas Room
10:00 am – 12:00 pm	Board of Directors Meeting	Corcoran Ballroom
12:00 pm – 1:00 pm	Buffet Lunch	Douglas Room
1:00 pm – 4:00 pm	Market Development Meeting	Smithson Room

March 10, 2016

Chair

Steven Mueller

Chairman
Southwestern Energy Company

Fax:

[REDACTED]@swn.com

Member

Orlando Alvarez

President, BP Energy Company
BP America Inc.

Ph:

Fax:

Patrick Blough

Chevron Global Upstream and Gas

Ph:

Fax:

[REDACTED]@chevron.com

Lee K. Boothby

President and Chief
Executive Officer
Newfield Exploration Company

Ph:

Fax:

[REDACTED]@newfield.com

John Christmann

President & CEO
Apache Corporation

Ph:

Fax:

[REDACTED]@apachecorp.com

Randy Cleveland

President
XTO Energy Inc.

Ph:

Fax:

[REDACTED]@xtoenergy.com

March 10, 2016

Member**Chris Conway****Vice President - Commercial**
ConocoPhillips

@conocophillips.com

Dan Dinges**Chairman, President and CEO**
Cabot Oil & Gas CorporationPh: [REDACTED]
Fax: [REDACTED]
[REDACTED]@cabotog.com**James C. Flores****President and Chief**
Executive Officer
Freeport- McMoRan Oil & GasPh: [REDACTED]
Fax: [REDACTED]
[REDACTED]@fmi.com**John Gatling****C.O.O, Hess Infrastructure Partners**
Hess CorporationPh: [REDACTED]
Fax: [REDACTED]
[REDACTED]@hess.com**Dave A. Hager****President & CEO**
Devon Energy CorporationPh: [REDACTED]
Fax: [REDACTED]
[REDACTED]@dvn.com**Steve Pastor****bhp billiton**Ph: [REDACTED]
Fax: [REDACTED]
[REDACTED]@bhpbilliton.com

March 10, 2016

Member**Frederick J. Plaeger, II****Vice President, Government Relations
EOG Resources, Inc.**Ph: [REDACTED]
Fax: [REDACTED]
[REDACTED]@eogresources.com

[REDACTED]

Robert (Bobby) K. Reeves**Exec. VP, and Chief Admin. Officer
Anadarko Petroleum Corporation**Ph: [REDACTED]
Fax: [REDACTED] 802-666-6211
[REDACTED]@anadarko.com

[REDACTED]

Jan Run Schøpp**President, Statoil Marketing
and Trading Inc.
Statoil**Ph: [REDACTED]
Fax: [REDACTED]@statoil.com

[REDACTED]

Charles Chuck Stanley**Chairman, President and CEO
QEP Resources, Inc.**Ph: [REDACTED]
Fax: [REDACTED]@qepres.com

[REDACTED]

Dave Stover**President & CEO
Noble Energy Inc.**Ph: [REDACTED]
Fax: [REDACTED]@nblenergy.com

[REDACTED]

Glenn Wright**Vice President, Shell
Energy North America
Shell Oil Company**Ph: [REDACTED]
Fax: [REDACTED]@shell.com

[REDACTED]

March 10, 2016

Member

Renee Zemljak

**EVP, Midstream, Marketing
& Fundamentals
Encana Corporation**

Ph: [REDACTED]

Fax:

[REDACTED]@encana.com

[REDACTED]



Natural Gas Markets Subcommittee

Member Company	Representative
Anadarko Petroleum Company	Chris Briggs Y.J. Bourgeois Kevin Kelly
Apache Corporation	Kelley Powell Mark Bright Other
BHP Billiton	Fred Hagemeyer
BP	Mark Stultz
Chesapeake Energy	Bill Wince Richard Easterly
Devon Energy	Bill Green
Hess	Michael Frailey Lesley Schaaff
Newfield	Randy Hairr Charlie Wojta
Noble Energy	Curtis Rueter Kathryn Skelton
QEP Resources	Joe Vance Shane Schulz
Southwestern Energy	Eddie Murray Jason Kurtz Jim Tramuto
XTO Energy	Jay Lauderdale <i>Randy Parker (Chair)</i>

AMERICAN PETROLEUM INSTITUTE
MARKET DEVELOPMENT COMMITTEE

CHARTER

MISSION: To sustain and promote the increased demand for and use of domestically produced natural gas.

PURPOSES: The Market Development Committee is a standing American Petroleum Institute (API) committee that reports to the Board of Directors. The Market Development Committee is organized to:

1. Develop strategies and oversee efforts to sustain and promote increased demand for U.S. natural gas resources in targeted market segments, including power generation, industrial/manufacturing, transportation/equipment and LNG export market segments
2. Identify, define and prioritize market growth opportunities in targeted market segments and provide strategic guidance for mission-focused activities
3. Develop and maintain guiding principles for engagement in relevant policy debates as they relate to sustaining and developing market growth opportunities
4. Ensure integration with relevant API committees and resources to build, maintain and enhance strategic value

MEMBERSHIP: The Market Development Committee shall be comprised of the Chair, CEO or President or their designees from executive company leadership of natural gas producing companies that are members of API. Each company with a representative on the Market Development Committee shall have one voting committee member.

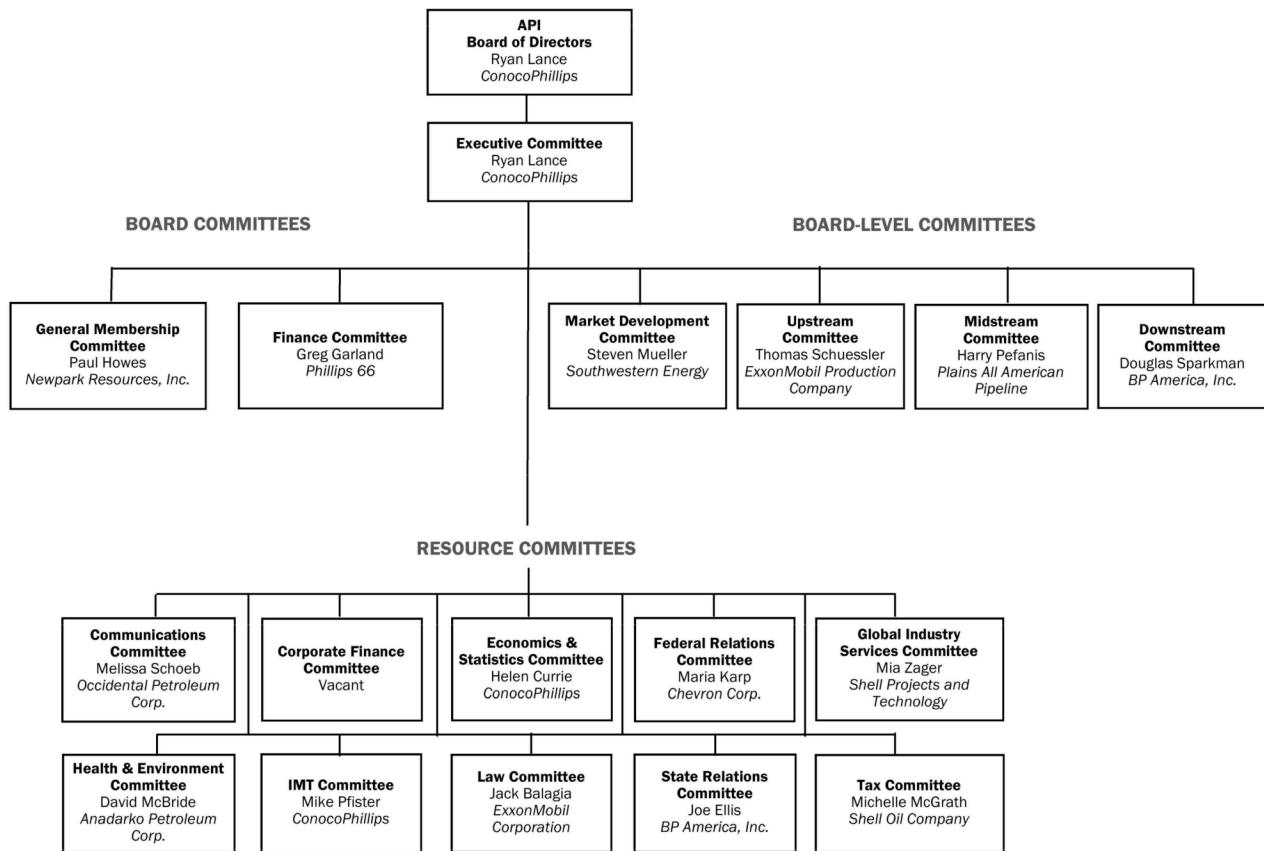
CHAIR: Pursuant to API's Charter and Bylaws, the Executive Committee has the authority to designate a member of the Executive Committee to chair the Market Development Committee. In the event that the Executive Committee does not designate one of its own members to serve as Chair, the Executive Committee will identify suitable candidates to chair the Market Development Committee. For the initial two calendar years following the formation of the Market Development Committee ("Initial Two-Year Period"), the Chair of the Market Development Committee shall be a senior executive from a former member of America's Natural Gas Alliance (ANGA) as the API Executive Committee shall designate.

STAFF AND RESOURCE SUPPORT: The Market Development Committee will be supported by the Executive Director of Market Development and by appropriate staff and resources of API to accomplish the goals and objectives of the Market Development Committee and any of its subcommittees.

MEETINGS: The Market Development Committee shall meet or convene at least two times per year with additional meetings to be convened as necessary. A simple majority of the members or their duly constituted proxies shall constitute a quorum for the conduction of business. Meetings of the Market Development Committee may be attended in person, or via telephonic or other means, provided that all of the attendees can hear one another.



2016 GOVERNANCE AND RESOURCE COMMITTEES STRUCTURE - Chairs





API Market Development

Structure & Issues Overview

[REDACTED] • www.api.org

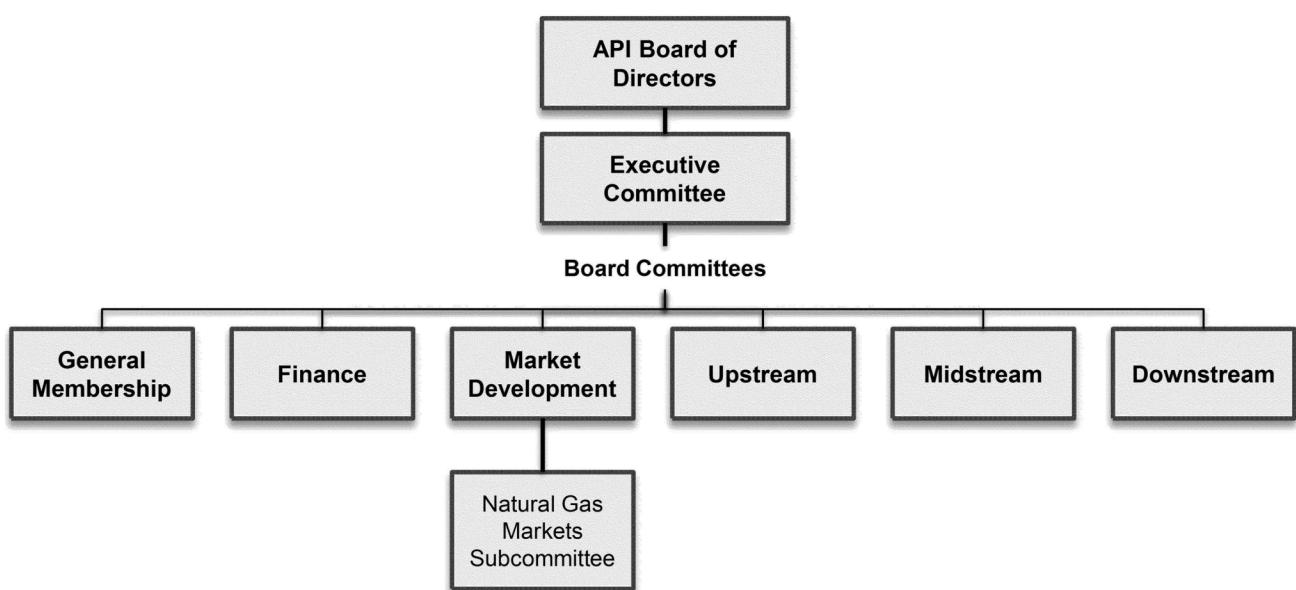
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New API Members

- Apache
- Cabot
- Cimarex
- EOG
- Newfield
- Noble Energy
- QEP
- Southwestern



Governance Structure



Market Segments

Mission: Promote increased demand for and use of natural gas



POWER



TRANSPORTATION



INDUSTRIAL



EXPORTS

ANGA's "Think About It" Messaging

Think about cleaner skies.

Natural gas helps make Denver International Airport one of America's most environmentally sustainable airports.

THINK ABOUT ENERGY BRIEFING

Upcoming Event:

You are invited to join representatives of America's Natural Gas Alliance, Greater Reading Chamber of Commerce & Industry, Greater Reading Economic Partnership, UGI Energy Services and UGI Utilities on November 20, 2015 for a complimentary breakfast buffet and discussion on natural gas supplies, production, consumption, infrastructure and more.

READING
NOVEMBER 20, 2015
7:30 a.m. - 9:30 a.m.
Albright College Campus Center
1621 N 13TH Street
Reading, PA 19604
[View Agenda](#)

LEWISBURG
MAY 15, 2015

SCRANTON
JANUARY 22, 2015

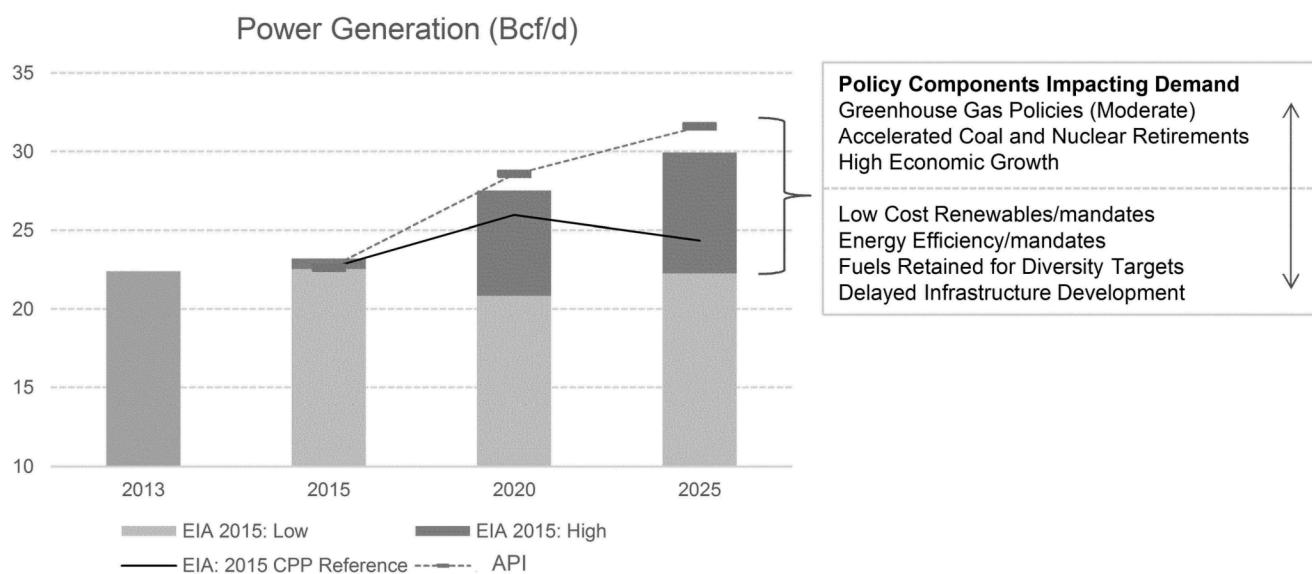
Registration is now closed for this event.

Recent Events:

- Agenda
- ANGA Presentation
- UGI Energy Services Presentation

- Agenda
- ANGA Presentation
- Marcellus Shale Coalition Presentation

Power Generation Demand Potential



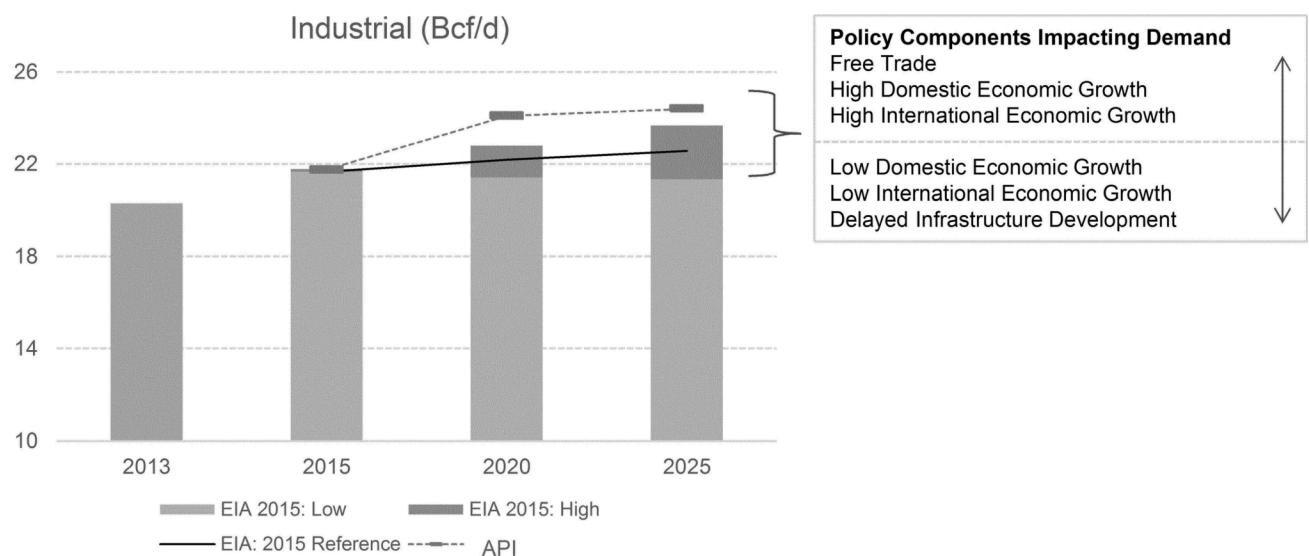
Source: AEO 2015, API Analysis



Power Generation

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Industrial Demand Potential



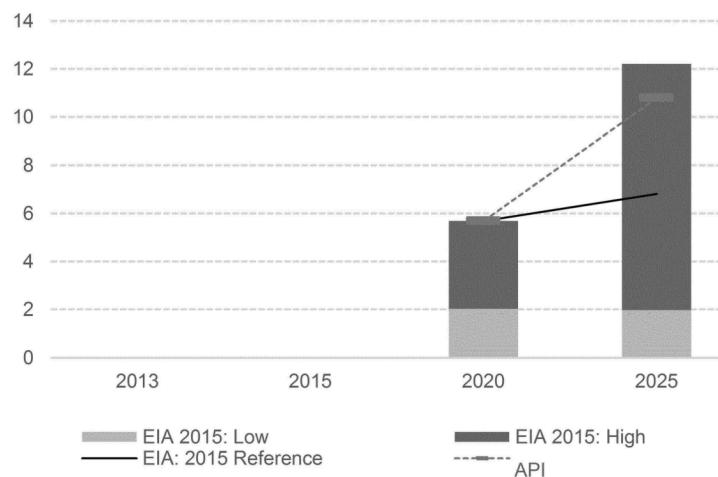
Source: AEO 2015, API Analysis



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LNG Net Export Demand Potential

LNG Net Exports (Bcf/d)

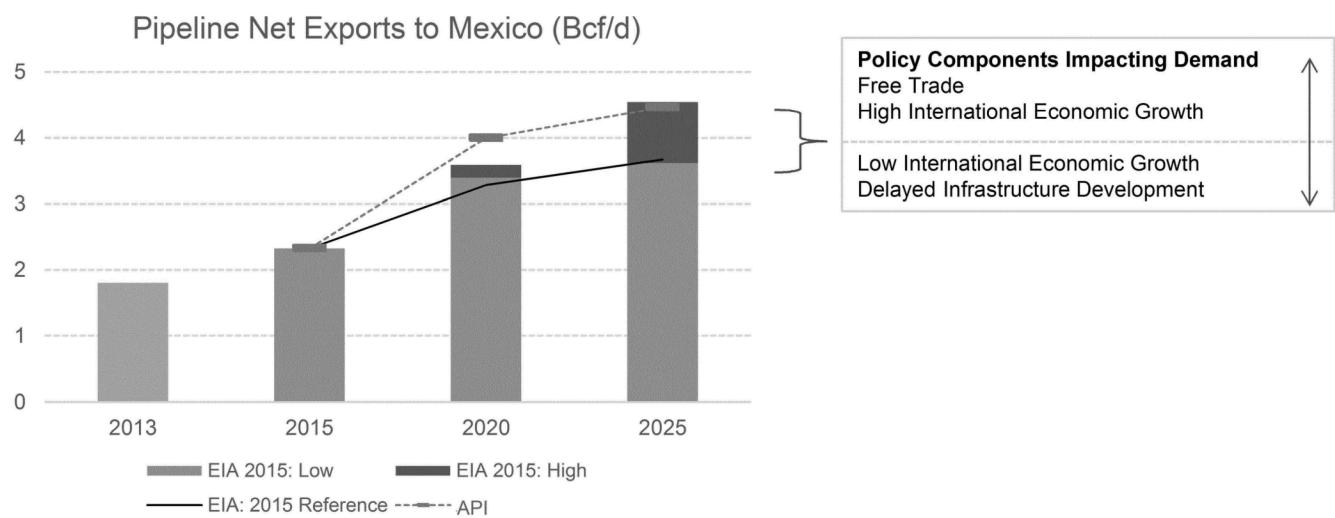


Policy Components Impacting Demand

- Free Trade
- High International Economic Growth
- High Oil Price
- Low Oil Prices
- Low International Economic Growth
- Delayed Permit Approvals

Source: AEO 2015, API Analysis

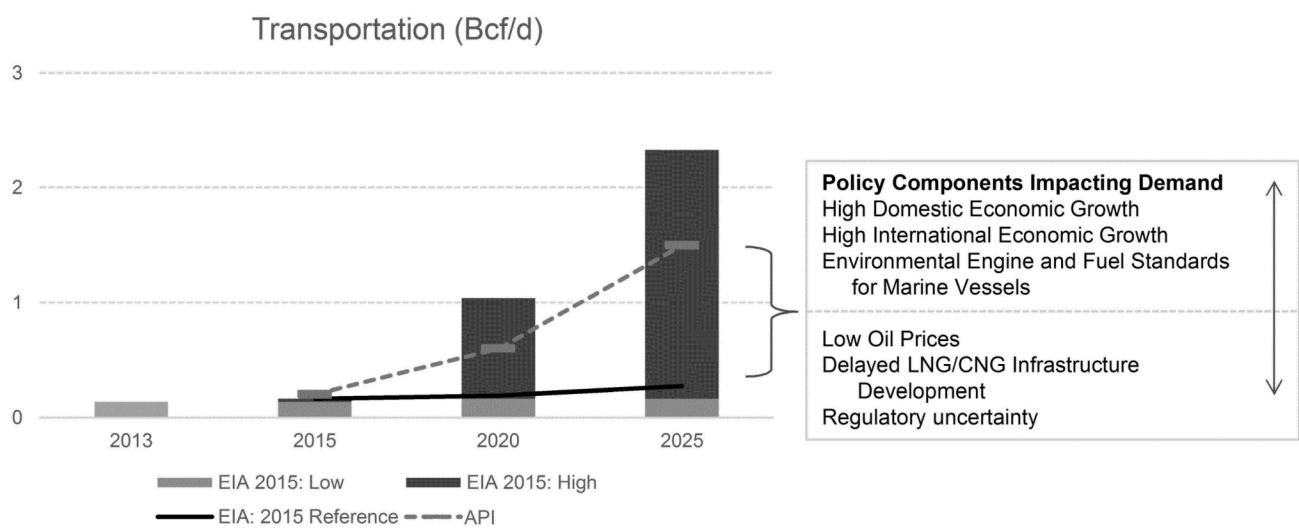
Mexico Pipeline Export Demand Potential



Source: AEO 2015, API Analysis

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Transportation Demand Potential



Source: AEO 2015, API Analysis



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For Information
Market Development Committee
March 17, 2016

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