



## 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

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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





## Market Development Committee

March 10, 2016

### Chair

Steven Mueller

Chairman  
Southwestern Energy Company

Fax:  
[REDACTED]  
[REDACTED]@swn.com

### Member

Orlando Alvarez

President, BP Energy Company  
BP America Inc.

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Fax:

Patrick Blough

Chevron Global Upstream and Gas

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Executive Officer  
Newfield Exploration Company

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President  
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## Market Development Committee

March 10, 2016

### Member

**Chris Conway**

**Vice President - Commercial  
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Cabot Oil & Gas Corporation**

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**James C. Flores**

**President and Chief  
Executive Officer  
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**John Gatling**

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**President & CEO  
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## Market Development Committee

March 10, 2016

### Member

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**President, Statoil Marketing  
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Statoil**

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**Charles Chuck Stanley**

**Chairman, President and CEO  
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**Dave Stover**

**President & CEO  
Noble Energy Inc.**

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**Glenn Wright**

**Vice President, Shell  
Energy North America  
Shell Oil Company**

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## Market Development Committee

March 10, 2016

### Member

Renee Zemljak

EVP, Midstream, Marketing  
& Fundamentals  
Encana Corporation

Ph:

Fax:  
@encana.com

Send updates to: @api.org



## 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.

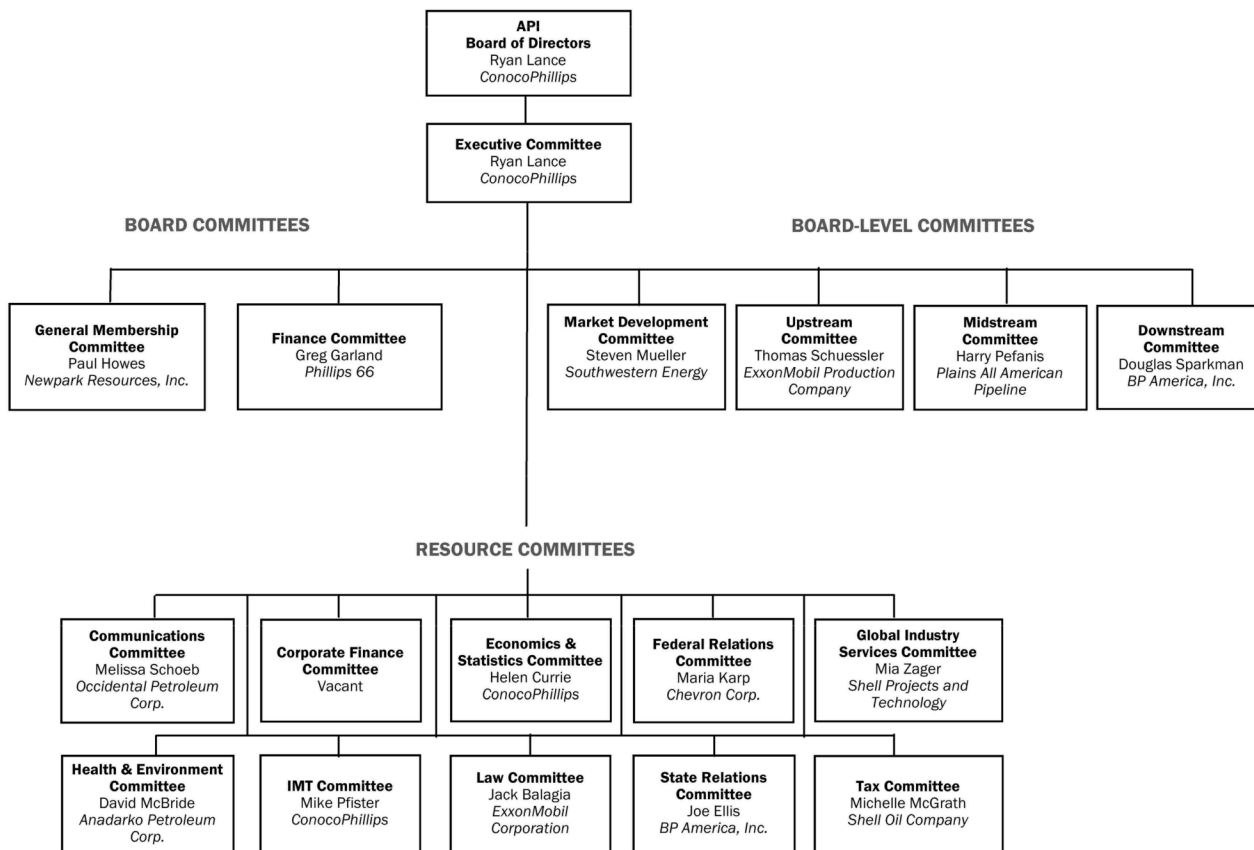
**STAFF AND RESOURCE SUPPORT:** The Market Development Committee will be supported by the Executive Director of Market Development and by appropriate staff and resources of API to accomplish the goals and objectives of the Market Development Committee and any of its subcommittees.

**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**

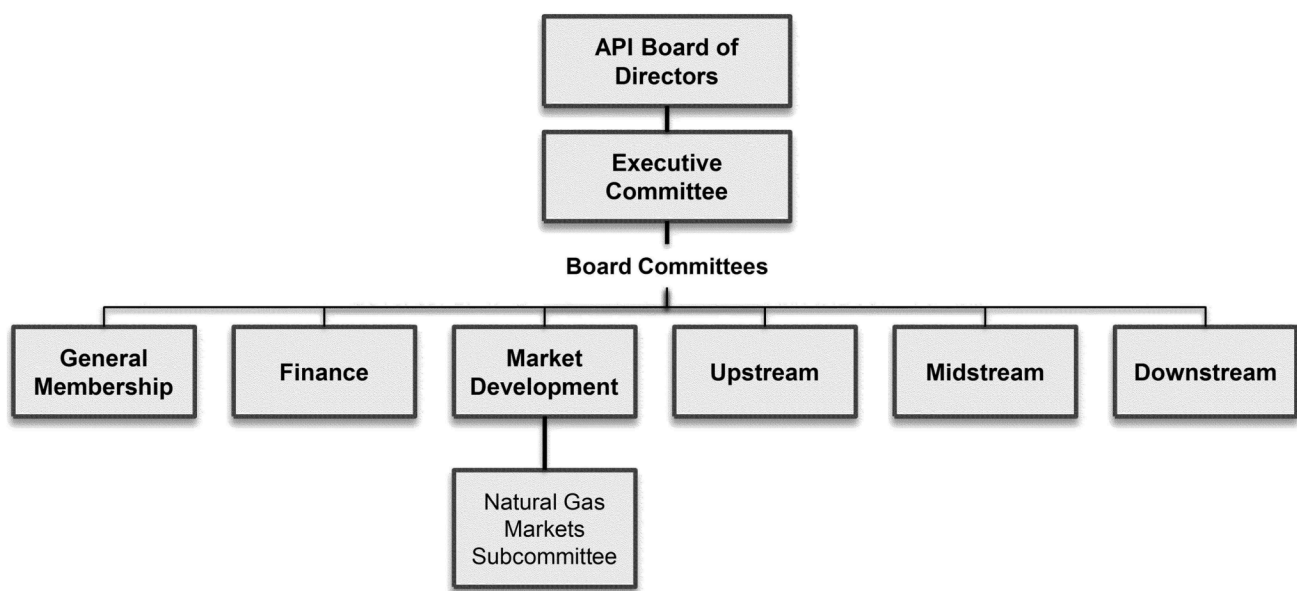
## **Structure & Issues Overview**

## 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.

[READ MORE](#)

**America's Nat. Gas** @ANGAusa  
Raising awareness about the economic and environmental benefits of clean, abundant and affordable natural gas.  
Washington, DC  
Joined November 2009

**Tweets** | Tweets & replies | Photos & videos

**Meet Harvey Power** - the second #LNG-fueled offshore supply vessel built in North America.

**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.**

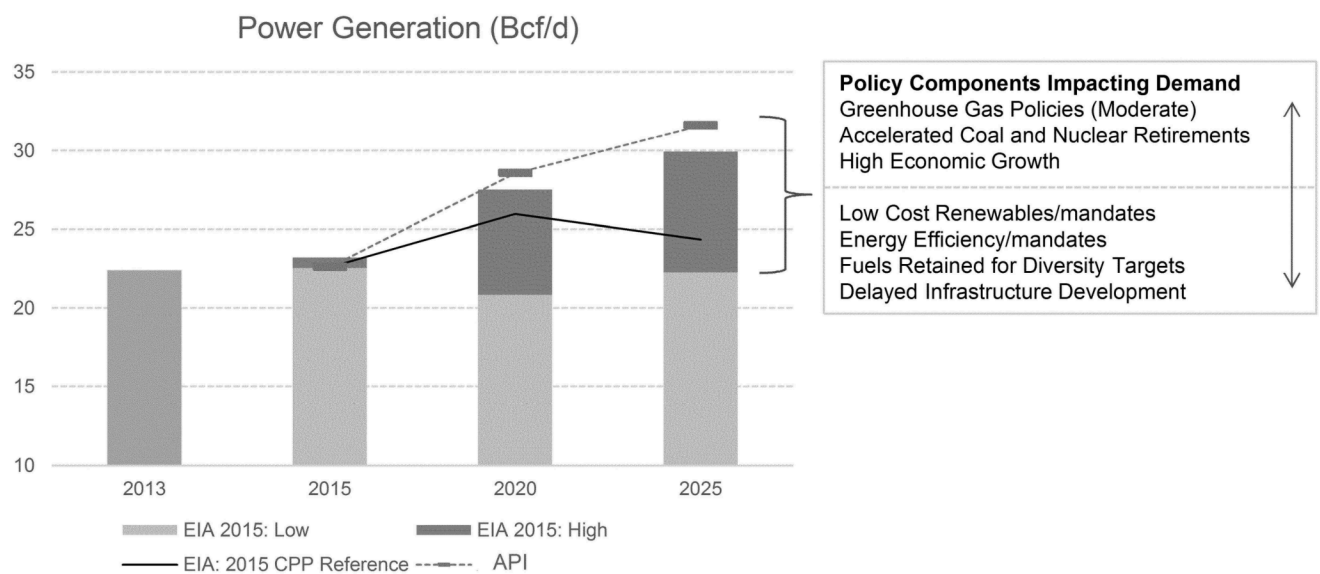
Albright College Campus Center  
1621 N 13TH Street  
Reading, PA 19604  
[View Agenda](#)

**Registration is now closed for this event.**

**Recent Events:**

<b>LEWISBURG</b> <b>MAY 15, 2015</b>	<b>SCRANTON</b> <b>JANUARY 22, 2015</b>
<ul style="list-style-type: none"> <li>• Agenda</li> <li>• ANGA Presentation</li> <li>• UGI Energy Services Presentation</li> </ul>	<ul style="list-style-type: none"> <li>• Agenda</li> <li>• ANGA Presentation</li> <li>• Marcellus Shale Coalition Presentation</li> </ul>

# Power Generation Demand Potential



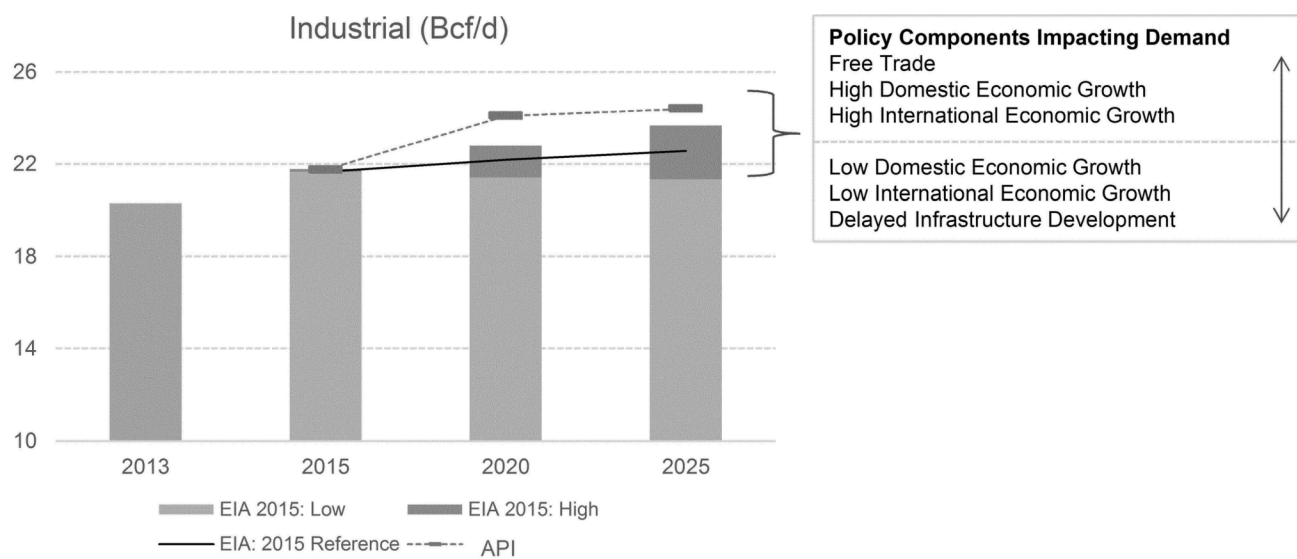
Source: AEO 2015, API Analysis



## Power Generation

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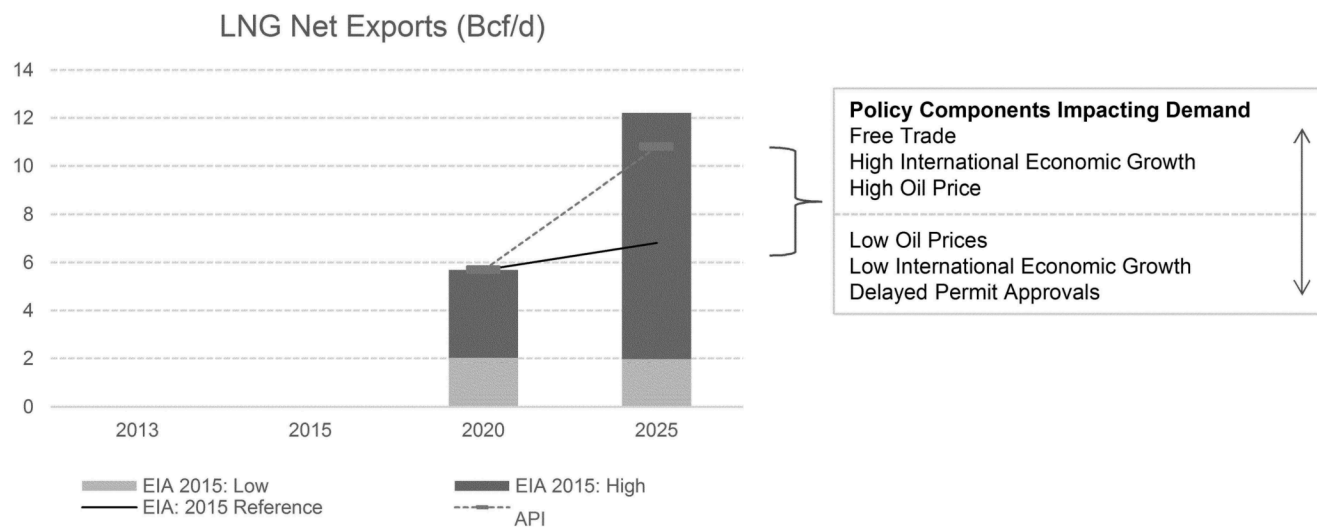
## Industrial Demand Potential



Source: AEO 2015, API Analysis

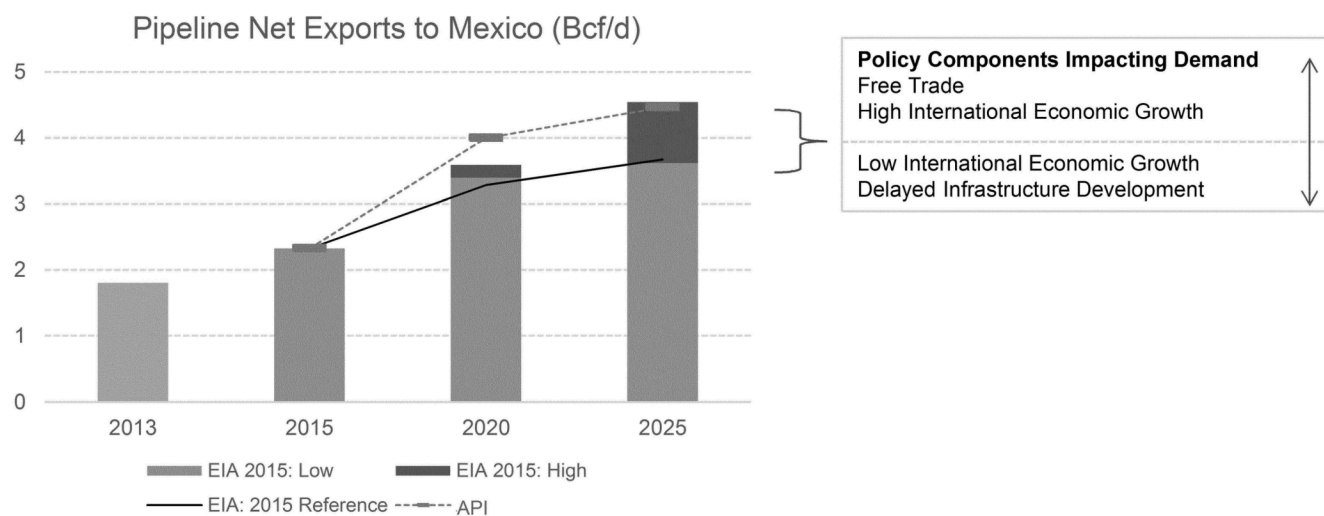
# Redacted - First Amendment

# LNG Net Export Demand Potential



Source: AEO 2015, API Analysis

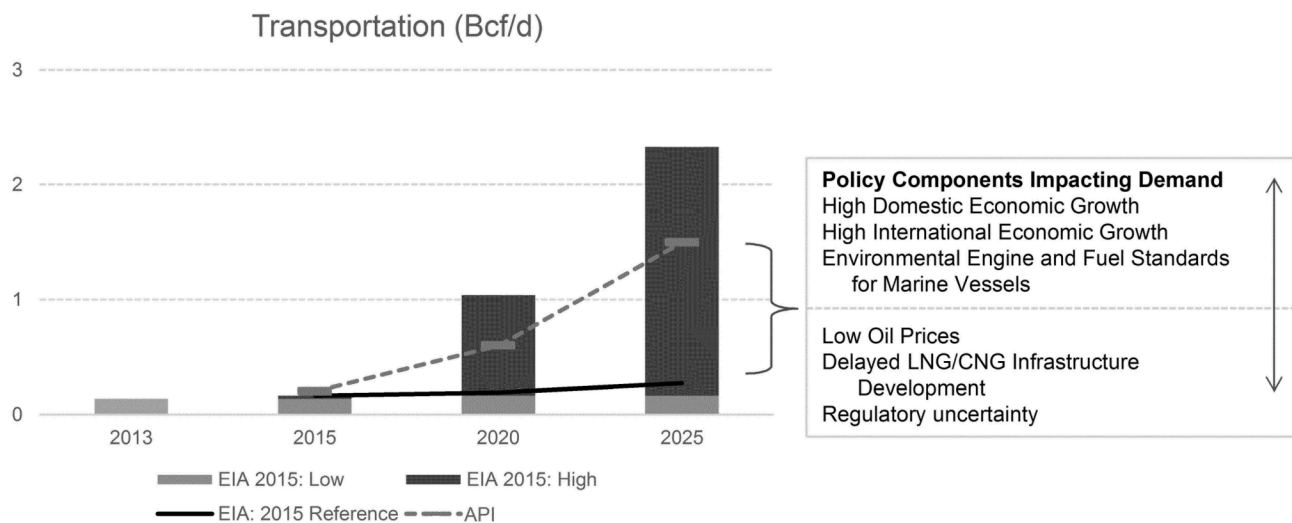
## Mexico Pipeline Export Demand Potential



Source: AEO 2015, API Analysis

# Redacted - First Amendment

# Transportation Demand Potential



Source: AEO 2015, API Analysis

## Redacted - First Amendment





# **Redacted - First Amendment**



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**Redacted - First Amendment**

# **Redacted - First Amendment**

# **Redacted - First Amendment**