CONCLUSIONS

• Production & Pipeline Growth Coupled With Distribution Creativity Will Reduce Need for New Gas Storage
• Natural Gas Liquids Will Require Significant Storage Capacity Increases
World War II
“GREATEST GENERATION”

Need for Liquid Fuels for Marine, Aviation, Vehicles, Created New Demand - “Gas Board”

Long Haul Pipeline Construction Begins
Natural Gas Liquids Must Be Removed

Seasonal Swings in Demand Force Storage Development

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Post World War II

“BOUNTIFUL HARVEST GENERATION”

Interstate Pipeline System Completed

“Purposeful” Gas Exploration and Development
Pipeline and Storage Projects Proliferate

Midstream Development- gathering, processing, gas liquids, petrochemicals

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“SHALE GAS GENERATION”

- Interstate Gas Pipeline System Expanding & Becoming More Flexible
- Midstream Development Boom Despite Low Gas Prices
- NGL’s Attain Star Status Only Eclipsed by Crude

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“SHALE GAS GENERATION”

- Greater Gas Production Flattens Price Fluctuations
- “Supply Area” and “Market Area” are blurry distinctions
- Creativity in Changing Flow Directions Reduce Need for Additional Gas Storage
“SHALE GAS GENERATION”

- Natural Gas Liquids Growth Must Move to Refining and Petrochemical Users
- Traditional Texas & Louisiana Storage and Pipeline Destinations See Enhanced Capacity
- Midwest Storage Locations Become Staging Areas
- “Unit Trains” May Become Mobile Tank Storage After Pipelines are Built

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Infrastructure Build Out Essential To Maintaining Growth
(Announced Increases Through 2014)

Gas Storage Advisors
Thank you for your attention

Gas Storage Advisors LLC assists clients in developing, acquiring, and divesting gas and liquid storage facilities and services. Our team is composed of professionals who have long experience in all aspects of gas storage.

We are hydrocarbon storage industry analysts, engineers, geologists, and finance and commercial specialists.

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