West Virginia’s Competitive Advantage Over the World

“Time for Action”
U.S. Natural Gas Production – First Energy Boom

Source: EIA.gov
The Age of Vertical Drilling
Dramatic increase in Natural Gas Production – Post WWII

Source: EIA.gov
Construction of the First Cross Country Pipeline - During WWII
Early Hydraulic Fracturing - Late 1940’s- Halliburton
THERE'S A SEAT RESERVED
for you...
on the Marietta Concrete Corporation plane
Record U.S. Natural Gas Production:

Source: EIA.gov

Production takes off in 2008

Source: EIA.gov
What once was can be again. But Better....
The Age of Horizontal Drilling:
Petrochemical Profitability = Build on top of the feedstock + Build in the center of customers

Shale Crescent USA
The Ohio Valley Energy Advantage
Petrochemical Profitability =

Build on top of the feedstock

+ Build in the center of customers
Growth in Marketed Natural Gas Production
2009 - 2018

Shale Crescent USA
A Majority of all U.S. Growth

Billion Cubic Feet Per Day


Rest of the U.S.  Shale Crescent USA (OH, WV, PA)
GROWTH IN MARKETED NATURAL GAS PRODUCTION 2008-2018

ACCOUNTS FOR 85% OF THE GROWTH

+26.5 BCF/D

Source: EIA and Shale Crescent USA
Marketed Natural Gas Production

Billion Cubic Feet Per Day

October 2018
Source: EIA.gov

- Shale Crescent USA: 30.3 Billion Cubic Feet Per Day
- Texas: 22.5 Billion Cubic Feet Per Day
Top Natural Gas Producers in the World

1st  USA
2nd  Russia
3rd  Shale Crescent USA
4th  Iran
5th  Qatar
6th  Canada
7th  China
8th  Norway
9th  Saudi Arabia
10th Algeria

Source: Deloitte and Shale Crescent USA
NATURAL GAS LIQUIDS PRODUCTION

*Source: IHS Markit*
Petrochemical Profitability =

Build on top of the feedstock

+ 

Build in the center of customers
Polypropylene Demand:
Petrochemical Profitability =

Build on top of the feedstock +
Build in the center of customers
SHALE CRESCENT USA COST ADVANTAGE VS. U.S. GULF COAST
(WHEN DELIVERED INTO SCUSA MARKET)

*Source: IHS Markit*
NET PRESENT VALUE IN 2020
SHALE CRESCENT USA VS U.S. GULF COAST
APPLYING A 15% DISCOUNT RATE

$ millions

Shale Crescent USA  US Gulf Coast

ETHYLENE/POLYETHYLENE FACILITY

*Source: IHS Markit
Petrochemical Profitability = Shale Crescent USA
Location Advantage:
Shipping Advantage:

Delivering finished products

Natural Gas & Natural Gas Liquid Supply

Shale Crescent USA
GROWTH IN MARKETED NATURAL GAS PRODUCTION 2008-2018

ACCOUNTS FOR 85% OF THE GROWTH

+26.5 BCF/D

Source: EIA and Shale Crescent USA
Chemical Investments & Announcements by State 2010 to 2018

Source: American Chemical Council & Shale Crescent USA
What Can We Do?
Print Media: 275 Million Impressions
Live Media: Over 160

- Presentations
- TV Interviews
- Radio Interviews
Events:
Expect Success
What if you could? How might that look?
World Petrochemical Conference:
Awareness:

THE ADVANTAGE OF SHALE CRESCENT
Time for Action
New Study

October 2019
Thank You

Mark Schwendeman: Chairman and Co-Founder
Jerry James: Vice Chairman and Co-Founder
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