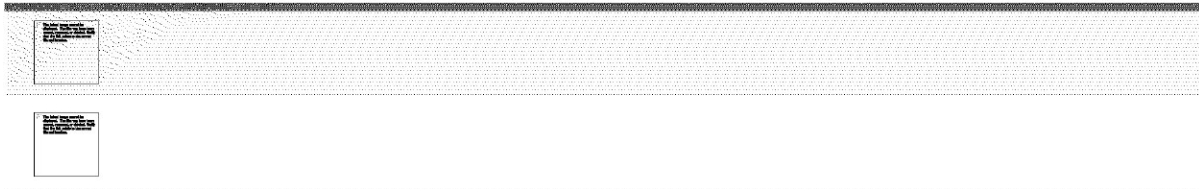


Message

From: Karen Harbert [globalenergy@uschamber.com]
Sent: 1/16/2019 5:19:31 PM
To: Gunasekara, Mandy [Gunasekara.Mandy@epa.gov]
Subject: What Does 2019 Have in Store for Energy?

Look No Further than 2018

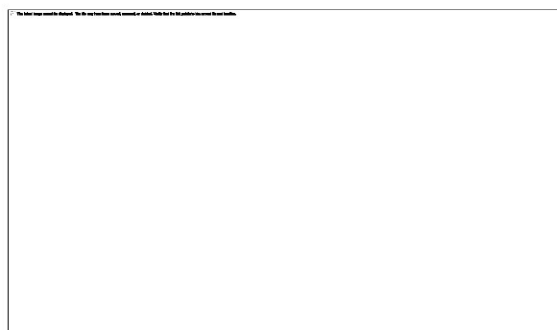


Dear Mandy:

Past is prologue, as they say. As we look forward to what 2019 could bring for American energy, it's worthwhile to look back at 2018 for some hints. With that in mind, here is our "look-back preview" of eight key trends and important issues that we believe will help to shape the year ahead.

1. American Energy Security Strengthens

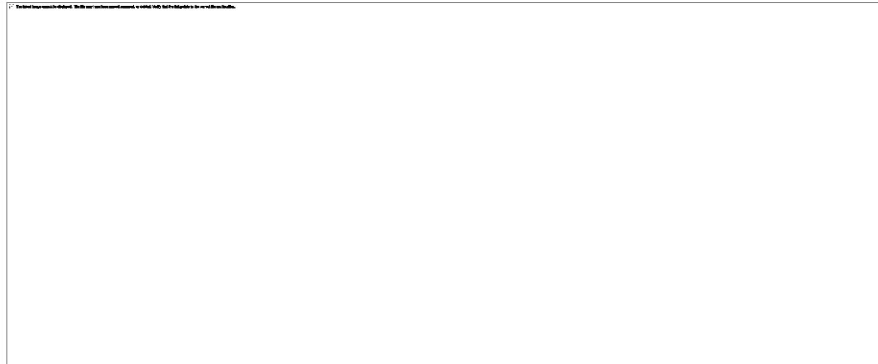
In 2018, American energy security continued to strengthen. In fact, we jumped seven spots to become the second-most energy-secure nation in the world, cementing the nation's status as a global energy superpower. This ranking comes from the latest edition of our very own International Index of Energy Security Risk. As U.S. Secretary of Energy Rick Perry wrote in his foreword:



2. America Officially Tops the World in Crude Oil Production

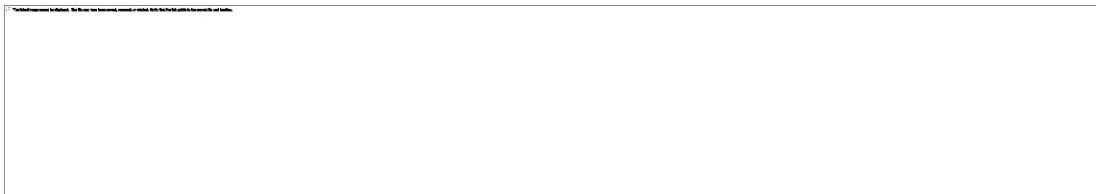
After much anticipation, the United States surpassed both Saudi Arabia and Russia this year to become the world's largest crude oil producer. This was the first time America claimed that top spot since the 1970s, and the U.S. Energy Information Administration

(EIA) expects domestic production to continue to lead the way throughout 2019. We also briefly became a net exporter of oil and refined fuels late in the year, and of course, America has been the top natural gas producer since 2009, becoming a net exporter in 2017.



3. Groundbreaking Advancements in Innovation and Technology

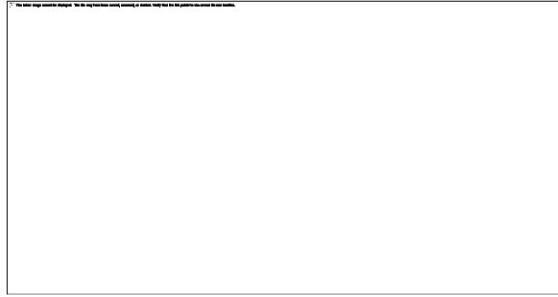
While the energy industry continues to make great strides in energy innovation – for example, hydraulic fracturing revolutionized American oil and natural gas production – in 2018 we saw significant new developments thanks in part to the hard work of the U.S. Department of Energy (DOE) and the private sector. From the startup of NETPower's innovative power plant, which captures and uses carbon dioxide emissions at no extra cost; to the opening of Alabama Power's Smart Neighborhood™, featuring a microgrid interconnecting a community of energy-smart homes; and finally to DOE's continued investment in research and development through its network of 17 National Laboratories, the year was a reminder of how energy innovation continues to make our lives better. In May of 2018, GEI launched our EnergyInnovates initiative to highlight these exciting projects, and you can bank on it continuing in 2019 as there are a lot more exciting stories to tell.



4. Critical Energy Infrastructure Approved

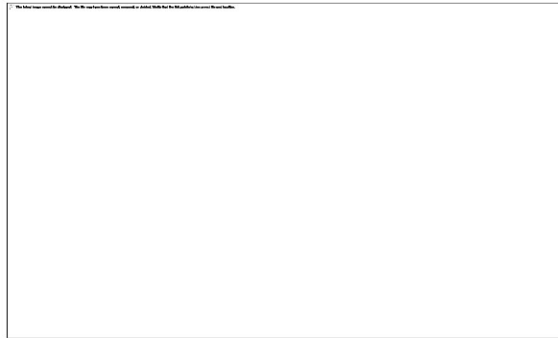
In 2018, a number of critical infrastructure projects were brought online, including the Valley Lateral Pipeline, Nexus Gas Transmission and the Cove Point LNG export plant. This means more Americans and our allies have access to the energy they need at prices they can afford. However, there are many other infrastructure projects that are on hold – some for years – because of a group of anti-energy activists relentlessly working to block our abundant resources from reaching consumers, no matter the cost. In December, we released a first-of-its-kind report quantifying the economic impact of the “Keep It In The Ground” movement, finding that these groups have delayed or prevented \$91.9 billion in

GDP, 728,079 job-years, and \$20.3 billion in tax revenues. While we celebrated some progress in 2018, we still face many hurdles to bring critical energy infrastructure online.



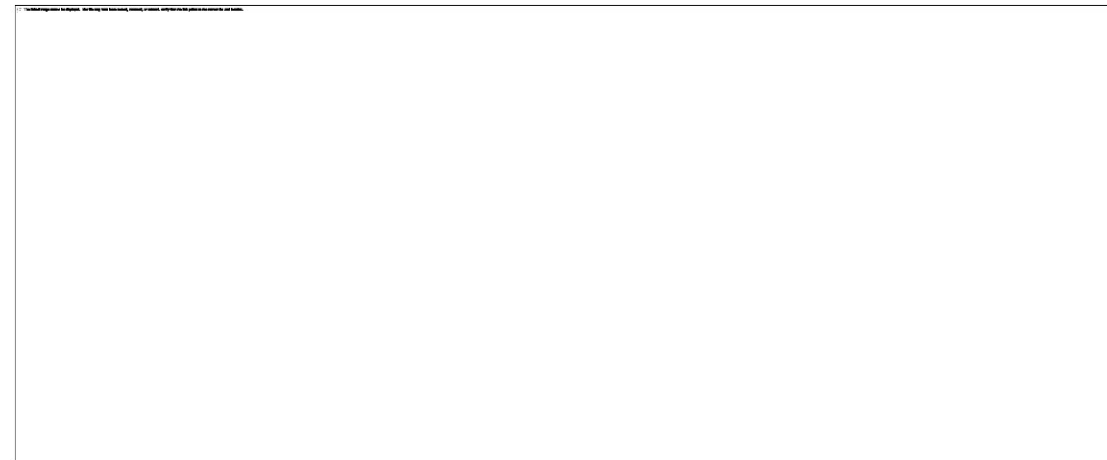
5. More Countries Than Ever Importing U.S. LNG and Crude Oil

A record number of countries imported liquefied natural gas (LNG) from the United States in 2017, and the list grew in 2018. In addition to sharing our wealth of resources with the world, the growing LNG industry means a stronger economy here at home. With even more projected growth in LNG exports, the United States will continue to see more job opportunities, higher GDP and improved trade balances. Meanwhile, crude oil exports increased nearly 80 percent from the first half of 2017 to the first half of 2018, making crude oil the largest U.S. petroleum export over natural gas liquids. And on Nov. 30, we reached a major milestone as, for the first time on record, we exported more crude oil and fuel than we imported.



6. Utility Savings Thanks to Tax Reform

American consumers began to save on their utility bills in 2018, thanks to the passing of the Tax Cuts and Jobs Act of 2017. As investor-owned utilities are seeing tax relief, they are passing their savings onto their customers. GEI analyzed 15 states and calculated the direct consumer savings on electricity bills over a five-year period, finding that savings range from \$100 million in Maine to nearly \$4 billion in Florida. These savings are then multiplied across the economy, resulting in more jobs and a higher GDP.



7. Midterm Voters Choose Energy Advancement

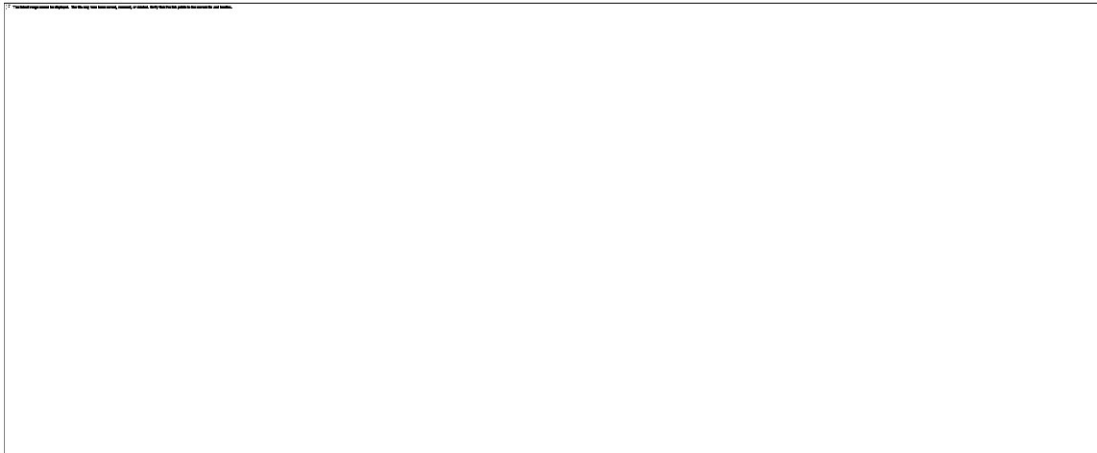
The midterm elections in November saw a number of contentious energy initiatives on state ballots – but even in places that are considered strongholds for environmental activists, voters chose energy – rejecting new government restrictions, mandates and taxes on our domestic energy resources. Despite celebrity support, Colorado voters said “no” to colossal setbacks for oil and gas development, described as “Colorado’s fracking ban,” and Washington state citizens again voted against a carbon tax. It seems that American voters largely understand the progress being made in the private sector to reduce its environmental impact and favor increased investment into innovation over costly government mandates.



8. Air Continues to Trend Cleaner

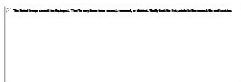
Despite the harmful rhetoric and scare tactics from anti-energy activists, the United States has some of the cleanest air in the world, and our air quality continued to improve in 2018. This year, GEI used EPA data to dig into the air quality of a handful of major U.S. cities, detecting a trend – all cities continued the improvements of the 1970s, 80s and 90s, while experiencing steady economic growth. We can thank the EPA, states, industry and environmental advocates for working together to advance technology and policy in a manner that cleans up our air and fosters economic growth. We also appreciate the

increased development of natural gas, which lowered energy-related CO2 emissions by 14% from 2005 to 2017 as we use more of it for power generation, according to EIA.



2018 was a year of American energy progress, and we look forward to continued growth in the year ahead!

Sincerely,



Karen Harbert
President and CEO
Global Energy Institute
U.S Chamber of Commerce



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