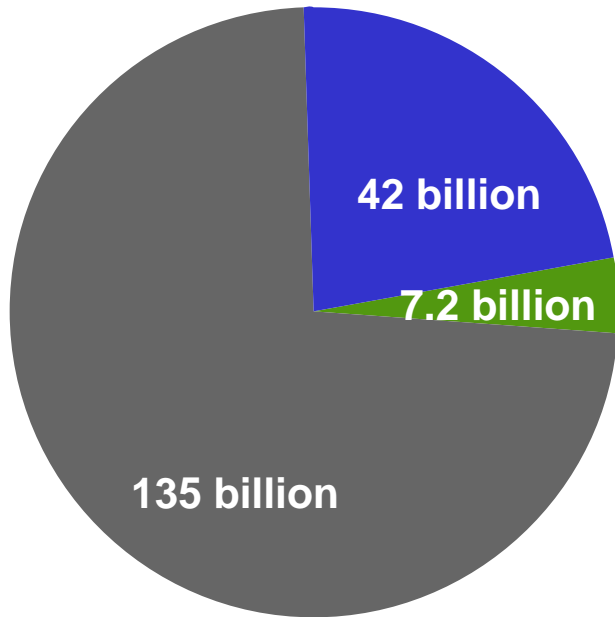


Gasoline and diesel dominate fuel use in the United States



2008 Fuel Consumption Estimates from U.S. Energy Information Administration/Alternatives to Traditional Transportation Fuels, 2008 (published Apr 2010)



■ Alternative Fuels ■ Gasoline ■ Diesel

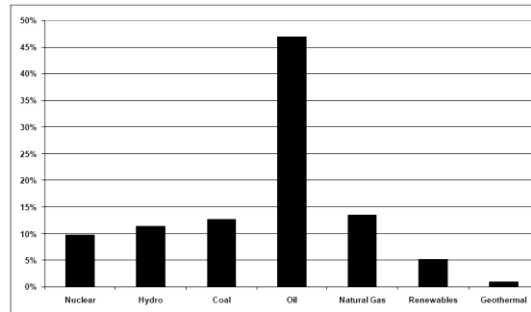
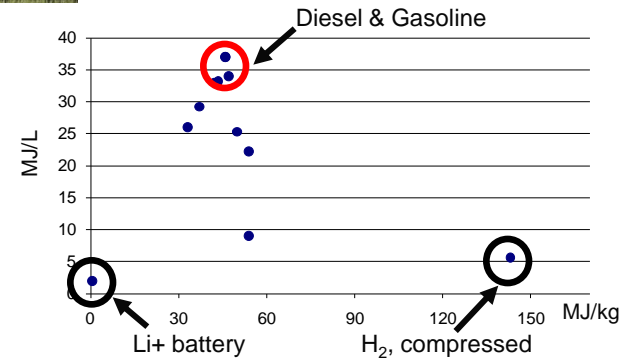
Values are reported in gasoline or equivalent gallons

Why oil is king?



Highest volumetric energy density of any practical fuel

Trillions and trillions in capital investments



Source: Management Information Services, Inc. (2006)

Single greatest recipient of federal energy incentives – \$300 billion over the past 50 years

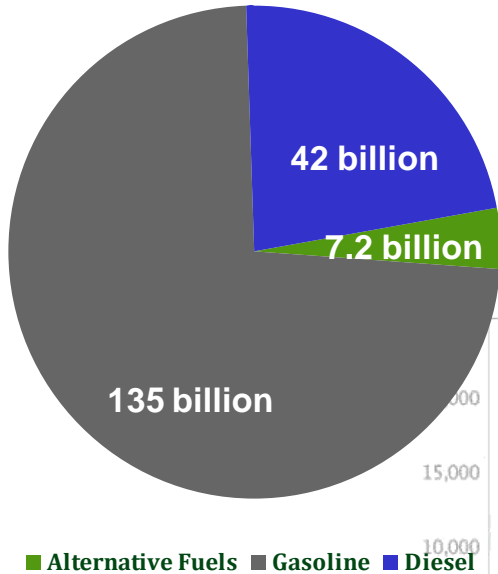
The U.S. dependence on imported oil is an economic weakness as well as a political and environmental challenge



Oil Imports to the US

Is the US too reliant on foreign oil?

2008 Fuel Consumption Estimates from U.S. Energy Information Administration/Alternatives to Traditional Transportation Fuels, 2008 (published Apr 2010)



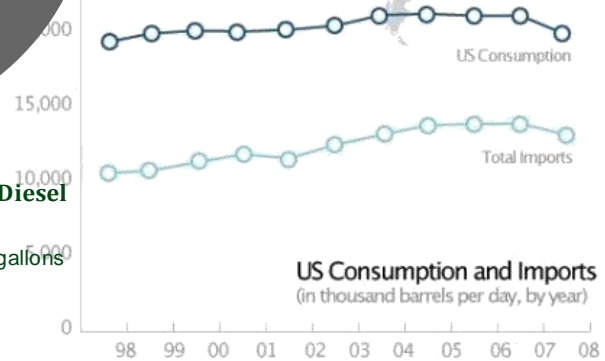
Values are reported in gasoline or equivalent gallons



The top 10 exporting countries of oil to the US in thousand barrels per day (June 2009)

The top 10 exporting countries account for **82%** of US crude oil imports

The US imported over **60%** of its oil in 2007



- 30.5** thousand million barrels Known US reserves
- 12.4** years How long the US's reserves will last at the current R/P rate
- 22.5%** of total oil produced in 2008 Was consumed by the US
- 7.8%** of total oil produced in 2008 Was produced by the US

Source: Energy Information Administration



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