

# Industrial Perspectives on Energy and Affordability

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# Natural Gas in Industry



## Direct Process Heat

- Glass
- Cement
- Fertilizer
- Petrochemicals
- Plastics



## Cogeneration

- Power
- Steam



## Feedstock

- Ethane
- Propane
- Butane

# Electricity in Industry



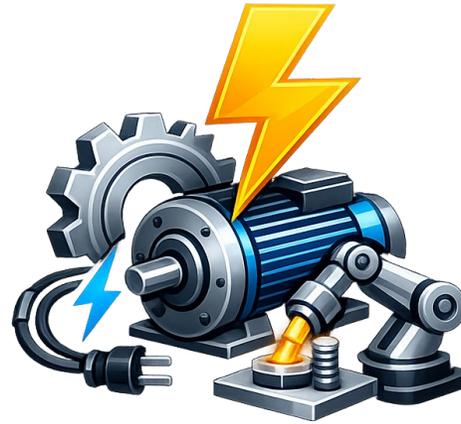
## Direct Process Energy

Steel

Aluminum

Silicon

Chloroalkali

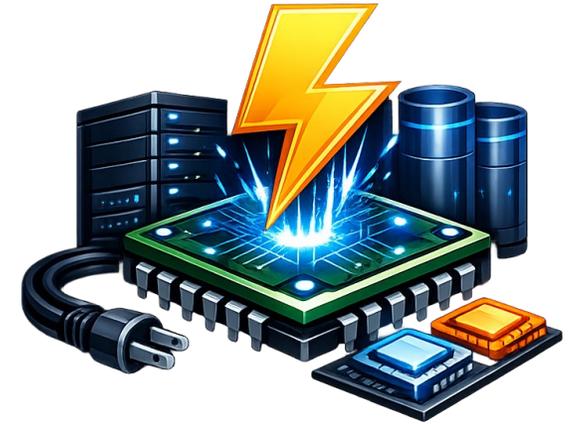


## Powering Equipment

HVAC

Pumps/Compressors

Machinery



## Digital Feedstock

Compute

AI Data Centers

# Energy Competitiveness in Industry



## Affordability

Cost of Natural Gas / Electricity

Volatility of Energy Supply

## Sustainability

Water Availability, Carbon Footprint

Carbon price, Abatement Cost

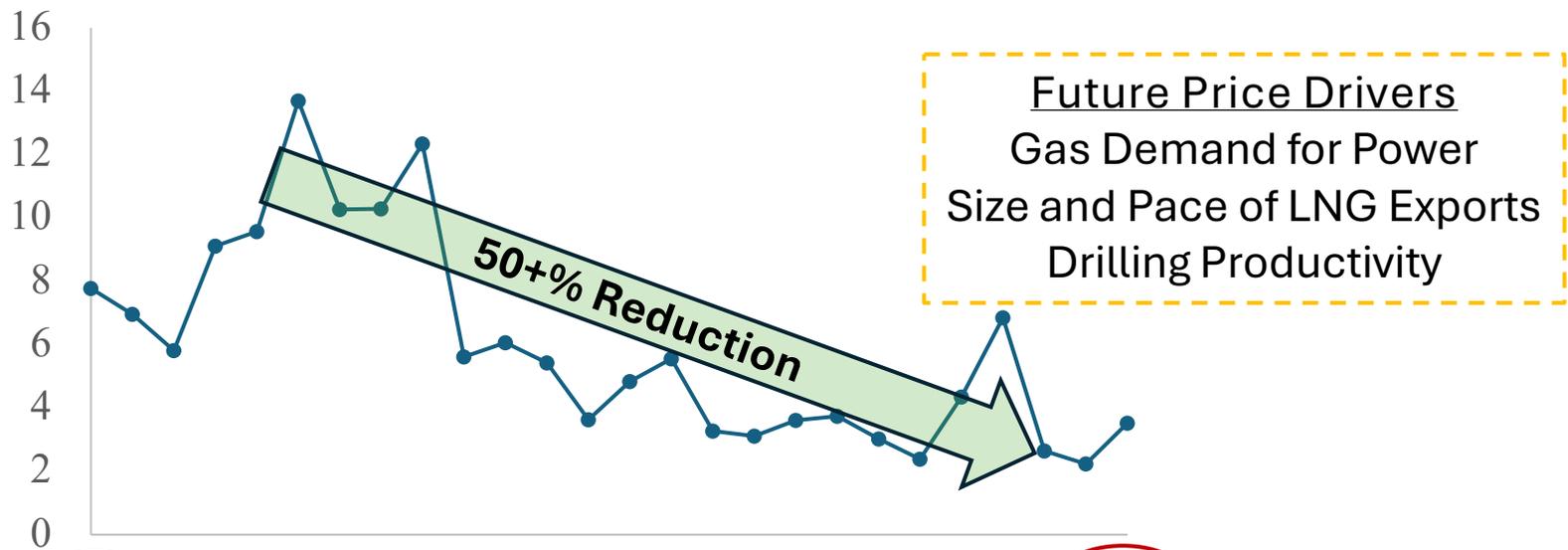
## Reliability

Infrastructure and Energy Availability

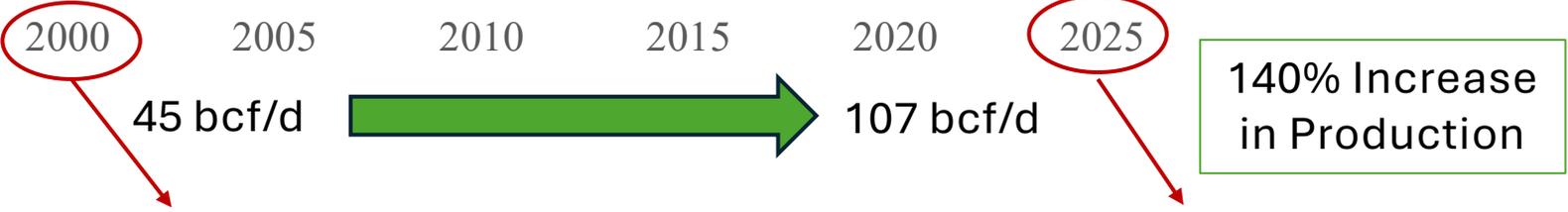
Energy competitiveness bridges these three key elements and drives longer-term, regional capital investment decisions

# Natural Gas and US Industrial Competitiveness

US Natural Gas Prices (\$/MMBTU, 2025\$)



American Chemistry Council

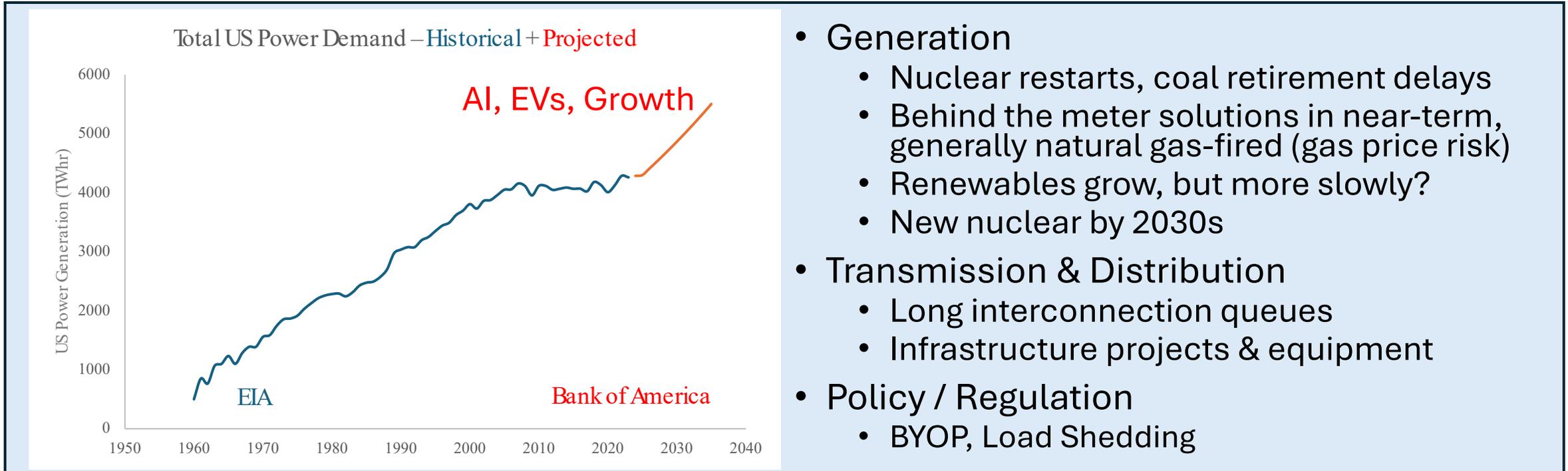


Coal Fired Power Gen: 2,000 TWhr  
Gas Fired Power Gen: 600 TWhr  
~855 kg CO<sub>2</sub>/MWhr

Coal Fired Power Gen: 700 TWhr  
Gas Fired Power Gen: 1,700 TWhr  
~660 kg CO<sub>2</sub>/MWhr

20+% Reduction in Thermal Stack Emissions

# Dynamic Electricity Markets: Growth after Stagnation



## Solutions Tool-Kit

