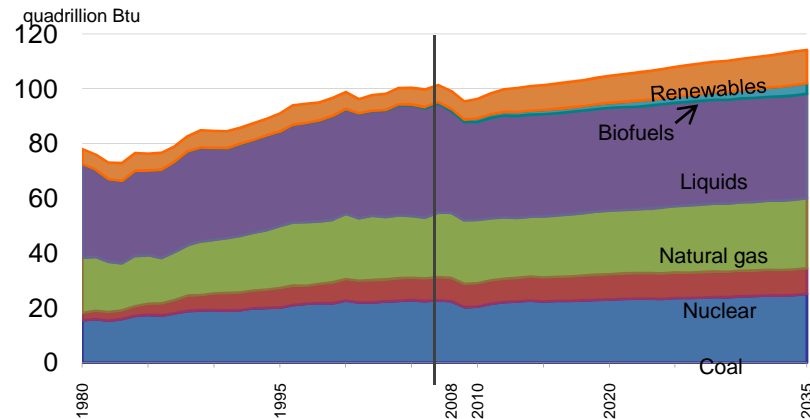


Key Energy Messages

- It will be difficult to “get off of oil” in the next 25 years.
- It will be difficult to make alternative energy a meaningful part of our energy supply in the next 25 years.
- It will be difficult to become more energy independent in the next 25 years.
- Oil supply is less of an issue than oil cost:
 - ✓ Oil will probably cost a lot more in the next 5 years,
 - ✓ That has serious implications for the U.S. and global economies that are predicated on cheap oil.

Figure 1. U.S. primary energy consumption, 1980-2035



	Coal	Nuclear	Natural Gas	Liquids	Biofuels	Renewables
2035	22%	8%	22%	33%	3%	11%
2010	21%	9%	24%	37%	1%	7%
Change	1%	-1%	-2%	-4%	2%	3%