

Trump Administration Policy

AND THE EFFECTS ON OIL AND GAS
DEVELOPMENT



Evan Vucci

What is our mission statement?

**We will advise Oil and Gas
operations according to policies
from The Trump administration**



President Trump's 2017 Administration

**Prioritized
Production**

**Replaced
plans**

Lifted Bans

**Weakened
Rules**

"As Trump Dismantles Clean Air Rules, an Industry Lawyer Delivers for Ex-Clients"

The New York Times

" Trump administration proposes rule to relax carbon limits "

The Washington Post

" Fact box: U.S. oil and gas regulatory rollbacks under Trump"

Reuters

Biden 2021



Andrew Harnik



Rejoining the Paris Agreement



Infrastructure Investment and Jobs Act (IIJA)



Inflation Reduction Act (IRA)



Trump's Current Administration

Maximum Pressure
Campaign

National Energy
Dominance Council

Foreign Sanctions

Promote Domestic
Oil & Gas

Trump's Current Administration

Table of Contents

- The Fed/ Domestic Economics

- Tax/ Tariff Policy

- Foreign Policy

- Environmental policy

The Federal Reserve & Its Influence on Oil Prices



The Fed controls interest rates and the money supply.



These decisions impact inflation, the dollar, and oil demand.



Changes in Fed policy can raise or lower oil prices.

Interest Rates & Oil Prices

01

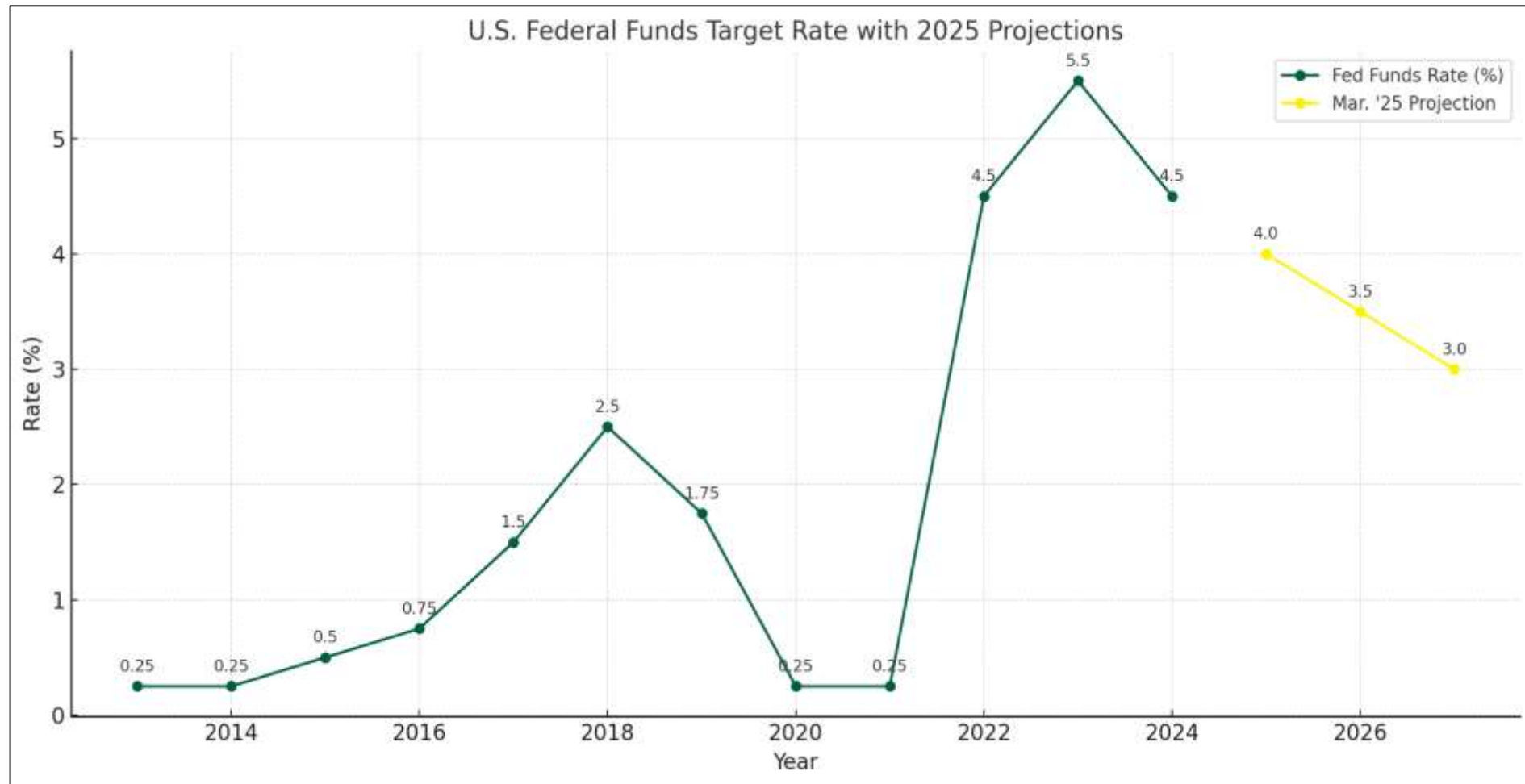
High rates →
Lower oil prices.

02

Low rates →
Higher oil prices.

03

Trump's push for
low rates may
raise oil prices.



<https://www.statista.com/chart/21023/us-federal-funds-target-rate/>

Quantitative Easing (QE) & Oil Prices

QE's Effect on the U.S. Dollar:

When the Fed prints more money, the value of the dollar **decreases**.

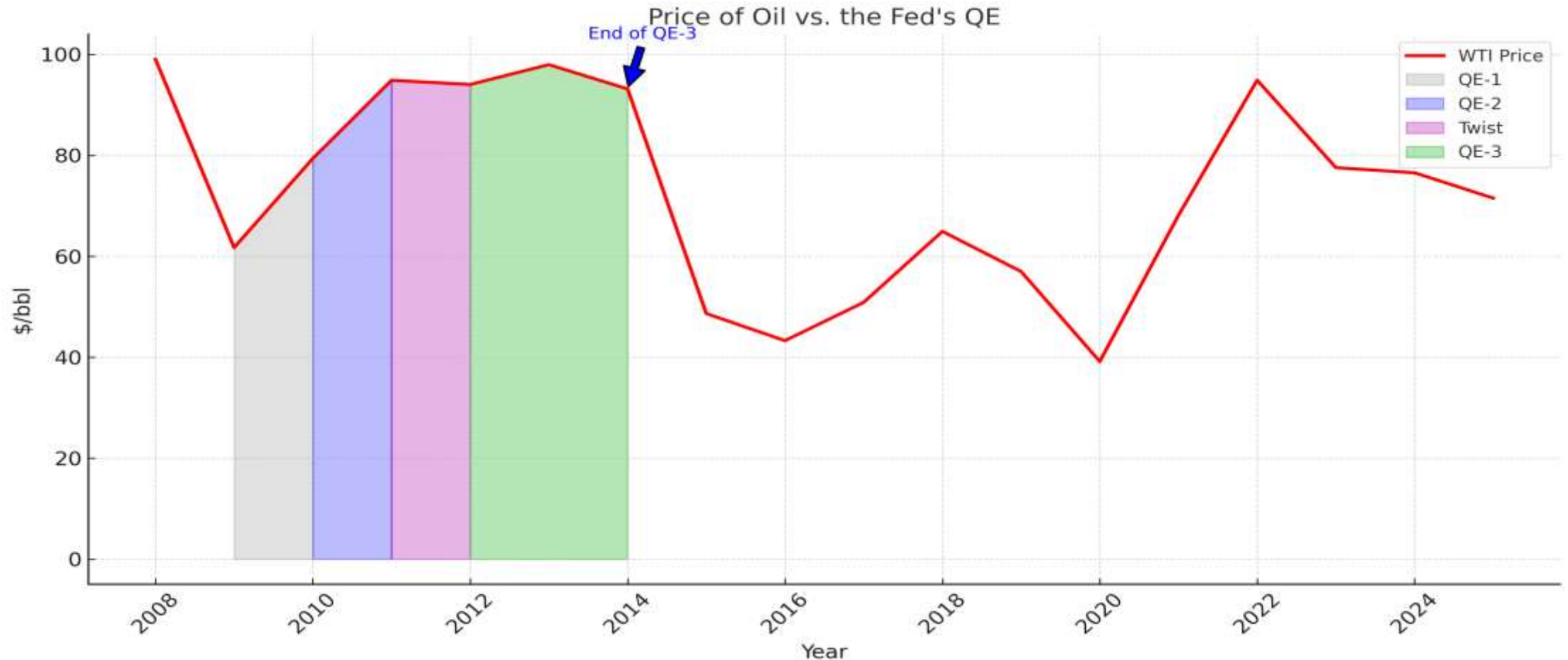
A weaker dollar makes commodities like oil **less expensive** for foreign buyers, increasing demand.

What is QE?

Federal Reserve buys financial assets to inject money into the economy

- Effect**
- Increases liquidity
 - Lowers interest rates
 - Weakens the U.S dollar

Case study - QE & Oil prices (2009 –



“Trump 2025: Future Impact on the Fed, Interest Rates & Oil”

- Trump may push for lower interest rates to boost growth.
- Fed Chair Jerome Powell's future is uncertain.
- QE-style policies could return, weakening the dollar.
- Lower rates + weaker dollar = likely rise in oil prices.

Trump Tax Policy

01

Repeal of Green
Energy Tax
Credits

02

Corporate Tax
Rate Reduction

03

Expansion of
Tariffs

International Emergency Economic Powers Act (IEEPA)



Grants President broad economic power during national emergencies



Can be used for Trump's tariffs ambitions



Can be used to impose tariffs or restrictions on oil and gas



Could influence Oil and gas prices

What is Really Happening With Tariffs?

Tariffs - implications for the oil and gas sector

Wood

Mackenzie

China shuts door on US LNG and crude as tariff war escalates

UpStream

Oil prices steady as market considers latest US tariff changes

Reuters

Tariffs rattle American, global oil and gas markets

Odessa American

World oil demand, U.S. supply to grow more slowly on tariff tensions, IEA says

Reuters

Trump's Tariff Turmoil Has Oil Prices So Low That It's Not Always Profitable to Drill

Investopedia

Impacts of Trump's Tariffs on North American Energy Markets

Vinson & Elkins

Trump tariff flip flops put energy industry on edge

Oil & Gas

Journal

International Tariffs

Policy

- 25% tariff on steel and aluminum
- Oil, gas, and petroleum derived products are exempt from the tariffs
- Focus on increasing domestic production of infrastructure materials



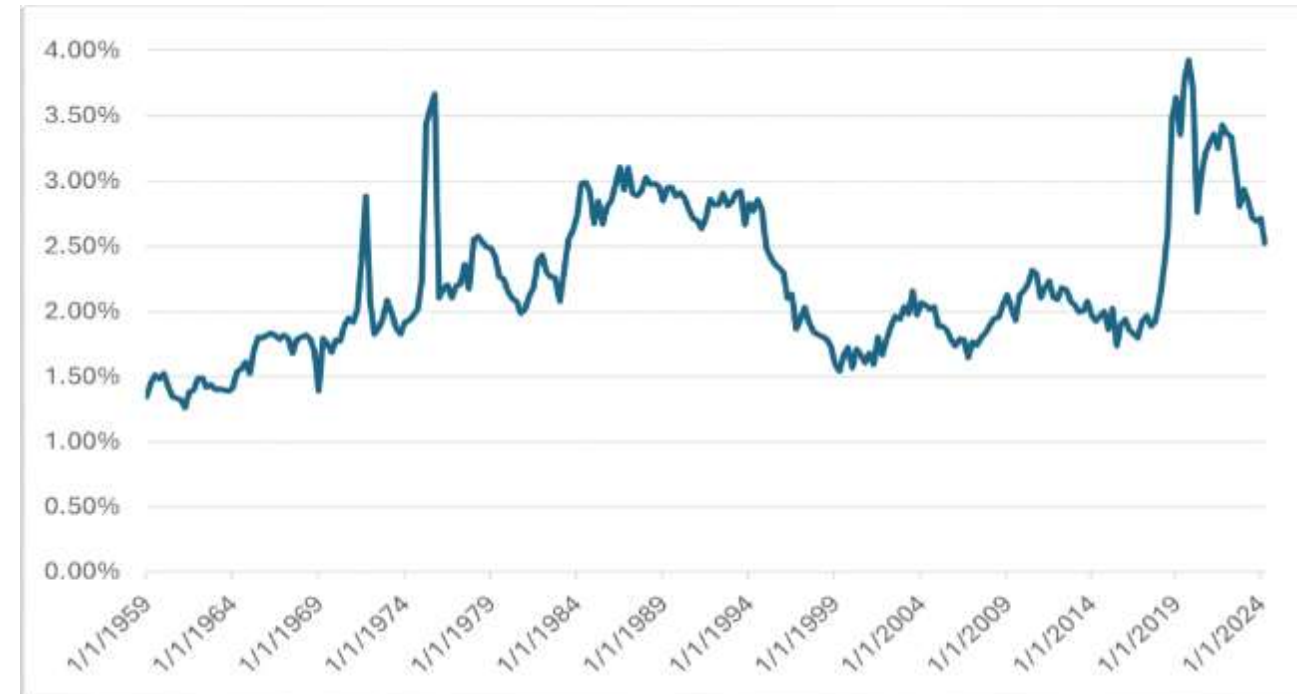
Effects

- Increase of domestic inventory and demand
- Political and economic retaliation from trade partners and material suppliers
- Decrease in barrel cost to \$60/barrel, approx 15% reduction

International Tariffs

TARIFF REVENUE AS A PERCENTAGE OF TOTAL FEDERAL RESERVE

- 10%-28% tariffs on ALL imports into the U.S.
- China: **245%** maximum (125% reciprocal)
- BRICS, EU, Venezuelan Oil Purchasers
 - **Section 301 of the Trade Act of 1974: Trump could impose tariffs on energy products such as oil and gas, if unfair trade practices occur.**



Trump's Foreign Policy

Increasing American energy
(LNG) exports to Europe

Executive order to focus on
domestic production

Focusing on Energy Industry
friendly policies and growth
structure

Tailored tariff exemption to permit
Oil and Gas growth

Lifted Environmental Restrictions

Unleashing
American Energy

(Executive Order 14154)

Unleashing Alaska's Extraordinary
Resource Potential

(Executive Order 14153)

EPA Deregulation



Carlos Barria

Unleashing Alaska's Extraordinary Resource Potential

- Removal of all restrictions from previous administrations that hinder development in Alaska
- Utilize Alaska's resources to boost economic growth in all sectors, such as energy, mineral, timber, and seafood
- Expedite the permitting and leasing of all projects relating to energy and resource extraction

Unleashing American Energy



Allows for energy exploration on all Federal lands and waters



Repeals all Biden-era policies that can limit energy exploration and extraction



Limits Federal funding for Green Initiatives, such as funding for clean energy and electric vehicle expansion

EPA Deregulation



Evan Vucci

10/30/2025



Rollback on policies and regulations that are targeted at energy production and manufacturing



Eradication of Electric Vehicle mandates and emission quotas to reduce hardship on businesses and consumers



Ending of the Good Neighbor Plan to lower strict Federal oversight and reinstate more power to the State to mitigate air pollution

Executive Summary

- **Monetary Policy:** Lower interest rates may raise oil prices

- **Tax Policy:** Lower corporate rates benefit domestic production

- **Tariff Policy:** Tariffs and trade shifts impact global supply chains

- **Environmental policy:** Expansion of drilling and LNG exports

Strategic Recommendations for Energy Companies

01

**Invest in
petroleum
infrastructure**

02

**Collaborate with
NEDC to lower
interest rates**

03

**Pursue federal
LNG lease
opportunities in
Alaska**

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We hope this presentation was both
insightful and interesting.

We are happy to take questions now!

Our Research Cohort's LinkedIn Group

