

Monthly Flash Estimates of

Electric Power Data

Data for:
July 2005

Section 1. Commentary

Retail sales of electricity in July 2005 increased a robust 6.8 percent from July 2004. The increased sales were primarily driven by an increase of 18.4 percent in July cooling degree days from last year, continuing the trend of a hotter than normal summer in 2005. Residential sector retail sales showed the greatest response to the hot weather, up 11.5 percent from July 2004.

Year-to-date, heating degree days are down slightly from 2004 but cooling degree days are up 5.7 percent, contributing to growth in total retail sales of 2.0 percent. Average retail prices for the rolling twelve months ending in July continue to run ahead of 2004 prices by 3.9 percent, with higher fuel prices the major factor.

Electricity generation also increased 6.8 percent from the previous July. The strong growth in sales and generation is reflected in the use of natural gas and petroleum liquids, the fuels typically used to meet incremental demand. Natural gas-fired generation increased 24.1 percent from July 2004, and petroleum-fired generation was up 6.5 percent. Year to date, natural gas consumption for power generation is up 6.3 percent, reflecting both demand growth and the continuing introduction of new gas-fired power plants.

Coal generation was up 2.8 percent in July 2005 compared to July 2004. Hydroelectric generation was up 11.7 percent for July and 6.3 percent year to date, as drought conditions continued to ease. However, nuclear generation continues to lag 2004 performance. Generation was down 2.9 percent from July 2004 and is now down 3.0 percent year to date. The lower output from baseload nuclear plants, due to greater lost capacity than in 2004 from planned and unplanned maintenance, is another factor contributing to the increased use of natural gas and petroleum.

An improving trend in coal stocks, in which monthly inventories were converging with 2005 levels, came to a halt with the Powder River Basin rail problems that began in late May. Coal stocks have now declined from 2004 levels for a second consecutive month. Coal stocks in July 2005 are off 5.8 million tons (5.2 percent) from July 2004 and dropped 9.4 million tons (8.2 percent) from June. In addition to the decline in coal stocks, normally stable oil inventories are down 15.2 percent from July 2004 and dropped by almost 10 percent between June and July 2005. It appears that high oil product prices are leading generators to burn down petroleum liquid inventories in lieu of making new purchases of oil. Petroleum inventories at power plants may bear watching as generators approach the winter.

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Section 2. Key Indicators of Generation, Consumption & Stocks

Data for:
July 2005

Table 2.1 Key Generation Indicators

	Total Generation	Nuclear Generation	Hydroelectric Generation
Total Change From:			
June 2005	10.7%	5.7%	-2.8%
July 2004	6.8%	-2.9%	11.7%
Year to Date	1.2%	-3.0%	6.3%
Latest 12 Month Period*	1.0%	-1.0%	5.8%

Table 2.2 Key Consumption and Stocks Indicators

	Natural Gas Consumption	Coal Consumption	Coal Stocks
Total Change From:			
June 2005	30.9%	7.5%	-8.2%
July 2004	25.4%	3.0%	-5.2%
Year to Date	6.3%	1.5%	n/a
Latest 12 Month Period*	5.9%	1.1%	n/a

* Change in total consumption or generation for the latest 12 month period (August 2004 to July 2005) compared to the prior 12 month period (August 2003 to July 2004).

Section 3. Month-to-Month Comparisons: Generation, Consumption and Stocks (Total)

Data for:
July 2005

Net Generation (Total, All Sectors)

Table 3.1 Total Net Generation (All Sectors)

Net Generation (thousand megawatthours)	Jul-05	Jul-04	% Change	Jun-05	% Change
Coal	186,299	181,196	2.8%	174,531	6.7%
Petroleum Liquids	10,959	10,292	6.5%	8,705	25.9%
Natural Gas	97,267	78,379	24.1%	75,254	29.3%
Nuclear	69,889	71,975	-2.9%	66,144	5.7%
Hydroelectric Conventional	25,946	23,225	11.7%	26,693	-2.8%
All Other	10,876	10,508	3.5%	11,048	-1.6%
Total (All Energy Sources)	401,237	375,574	6.8%	362,375	10.7%

Fossil Fuel Consumption for Electric Generation (Total, All Sectors)

Table 3.2 Total Consumption of Fossil Fuels for Electric Generation (All Sectors)

Consumption of Fossil Fuels	Jul-05	Jul-04	% Change	Jun-05	% Change
Coal (Thousand Short Tons)	97,416	94,566	3.0%	90,587	7.5%
Petroleum Liquids (Thousand Barrels)	18,751	17,598	6.6%	14,913	25.7%
Natural Gas (Million Cubic Feet)	847,292	675,558	25.4%	647,253	30.9%

Fossil Fuel Stocks (Electric Power Sector)

Table 3.3 Total Fossil Fuel Stocks (Electric Power Sector)

Fossil Fuel Stocks	Jul-05	Jul-04	% Change	Jun-05	% Change
Coal (Thousand Short Tons)	106,295	112,081	-5.2%	115,740	-8.2%
Petroleum Liquids (Thousand Barrels)	37,698	44,460	-15.2%	41,734	-9.7%

Notes:

- **Coal consumption and generation** includes subbituminous coal, bituminous coal, anthracite, lignite, waste coal and synthetic coal (synfuel).
- **Coal stocks** includes the coal categories listed immediately above except for waste coal.
- **Petroleum Liquids consumption and generation** includes distillate oil, residual oil, jet fuel, kerosene and waste oil.
- **Petroleum Liquids stocks** includes the oil categories listed immediately above, except waste oil is excluded from data collected for January 2004 and subsequently. Data prior to 2004 contains small quantities of waste oil.
- **The "All Other" generation category** includes biomass, solar, wind, geothermal, hydroelectric pumped storage, petroleum coke, other gases, and other miscellaneous energy sources.

Section 4. Net Generation Trends

Data for:
July 2005

Table 4.1 Trends in Total Generation by Fuel (All Sectors)
Millions of Kilowatthours

Year-to-Date Comparison

	Starting Month	Ending Month	Coal	Petroleum Liquids	Natural Gas	Nuclear	Hydroelectric Conventional	All Other	Total
Current Period	January 2005	July 2005	1,154,901	51,921	429,179	447,455	170,786	74,272	2,328,514
Prior Period	January 2004	July 2004	1,143,709	63,803	400,681	461,471	160,704	70,568	2,300,936
Percent Change			1.0%	-18.6%	7.1%	-3.0%	6.3%	5.2%	1.2%

Comparison to Prior 12 Month Period

	Starting Month	Ending Month	Coal	Petroleum Liquids	Natural Gas	Nuclear	Hydroelectric Conventional	All Other	Total
Current Period	August 2004	July 2005	1,987,526	87,146	728,108	774,539	279,719	123,947	3,980,985
Prior Period	August 2003	July 2004	1,987,788	101,702	684,208	782,307	264,344	121,826	3,942,175
Percent Change			0.0%	-14.3%	6.4%	-1.0%	5.8%	1.7%	1.0%

Figure 4.1 Trends in Total Net Generation (All Sectors): 2003, 2004, and 2005

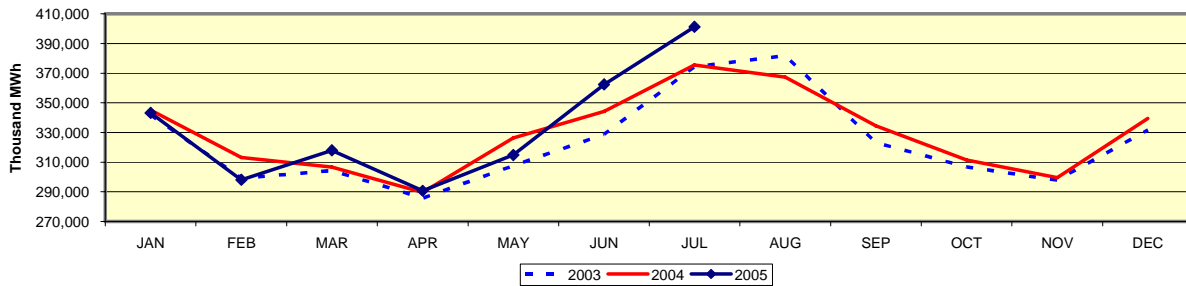


Figure 4.2 Fossil Fuel Generation Trends (Values as Indices, Jan. 2002 = 1.0)

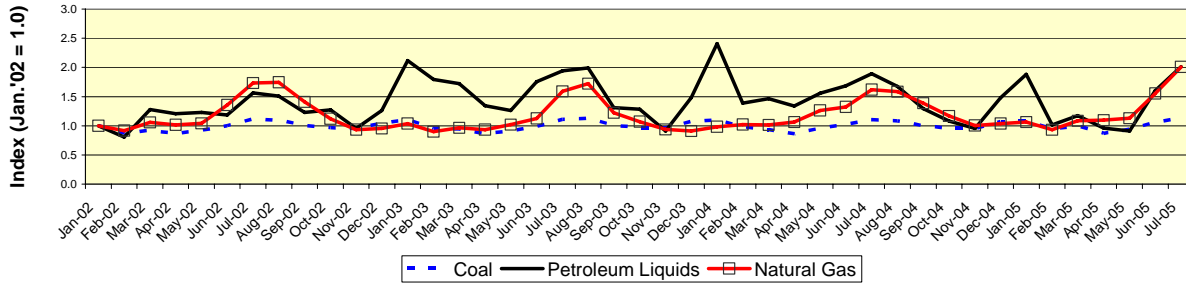
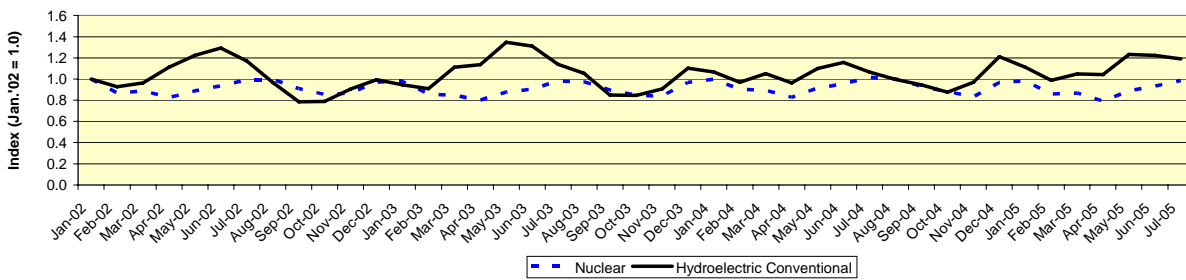


Figure 4.3 Nuclear and Hydroelectric Generation Trends (Values as Indices, Jan. 2002 = 1.0)



Section 5. Fossil Fuel Consumption and Stock Trends

Data for:
July 2005

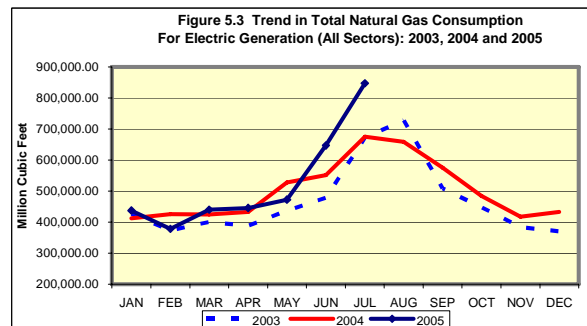
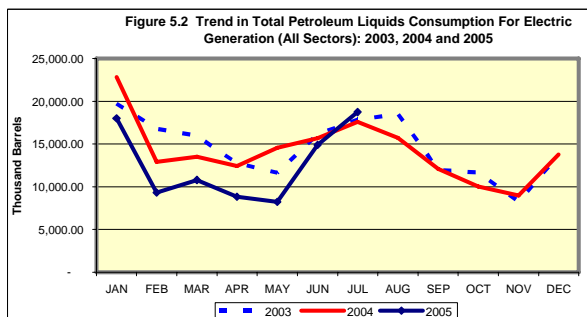
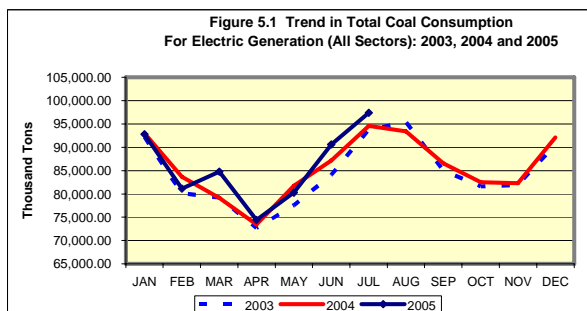
Table 5.1 Trends in Fossil Fuel Consumption For Electric Generation, Total (All Sectors)

Year-to-Date Comparison

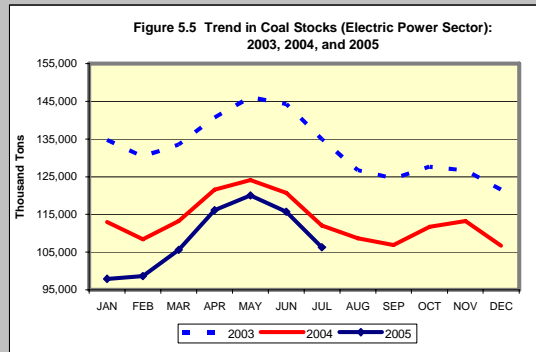
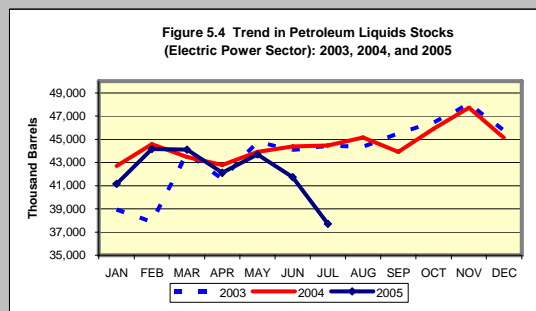
	Starting Month	Ending Month	Coal (Thousand Tons)	Petroleum Liquids (Thousand Barrels)	Natural Gas (Million Cubic Feet)
Current Period	January 2005	July 2005	601,330	88,901	3,669,701
Prior Period	January 2004	July 2004	592,663	109,618	3,450,670
Percent Change			1.5%	-18.9%	6.3%

Comparison to Prior 12 Month Period

	Starting Month	Ending Month	Coal (Thousand Tons)	Petroleum Liquids (Thousand Barrels)	Natural Gas (Million Cubic Feet)
Current Period	August 2004	July 2005	1,038,232	149,529	6,239,366
Prior Period	August 2003	July 2004	1,027,137	173,869	5,889,328
Percent Change			1.1%	-14.0%	5.9%



Stocks Trends



Note: the Stocks data table is on page 3 of the report.

Section 6. Month-to-Month Comparisons: Electric Power Retail Sales and Average Prices

Data for:
July 2005

Retail Sales

Table 6.1 Retail Sales (Million Kwh)

Ultimate Customer	Jul-05	Jul-04	% Change	Jun-05	% Change
Residential	144,699	129,753	11.5%	116,521	24.2%
Commercial	122,381	115,638	5.8%	114,505	6.9%
Industrial	89,855	88,628	1.4%	89,634	0.2%
Transportation	669	667	0.3%	667	0.3%
All Sectors	357,603	334,685	6.8%	321,327	11.3%

Average Retail Price

Table 6.2 Average Retail Price (Cents/kWh)

Ultimate Customer	Jul-05	Jul-04	% Change	Jun-05	% Change
Residential	9.72	9.34	4.1%	9.74	-0.2%
Commercial	8.94	8.60	4.0%	8.86	0.9%
Industrial	5.96	5.46	9.2%	5.71	4.4%
Transportation	8.03	6.81	17.9%	7.52	6.8%
All Sectors	8.50	8.05	5.6%	8.30	2.4%

Section 7. Retail Sales Trends

Data for:
July 2005

Table 7.1 Trends in Total Retail Sales of Electricity (All Sectors)
Millions of Kilowatthours

Year-to-Date Comparison

	Starting Month	Ending Month	Residential	Commercial	Industrial	Transportation	Total (All Sectors)
Current Period	January 2005	July 2005	772,294	724,486	597,706	4,776	2,099,262
Prior Period	January 2004	July 2004	757,312	705,451	590,490	4,449	2,057,701
Percent Change			2.0%	2.7%	1.2%	7.3%	2.0%

Comparison to Prior 12 Month Period

	Starting Month	Ending Month	Residential	Commercial	Industrial	Transportation	Total (All Sectors)
Current Period	August 2004	July 2005	1,308,430	1,247,542	1,028,113	8,002	3,592,087
Prior Period	August 2003	July 2004	1,293,426	1,219,356	1,018,323	7,338	3,538,443
Percent Change			1.2%	2.3%	1.0%	9.0%	1.5%

Figure 7.1
Trends in Total Retail Sales of Electricity (All Sectors):
2003, 2004, and 2005

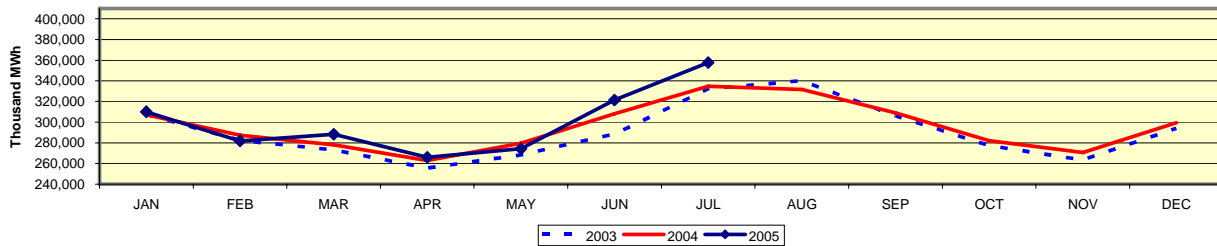


Figure 7.2
Retail Sales of Electricity Trends
(Values as Indices, Jan. 2002 = 1.0)

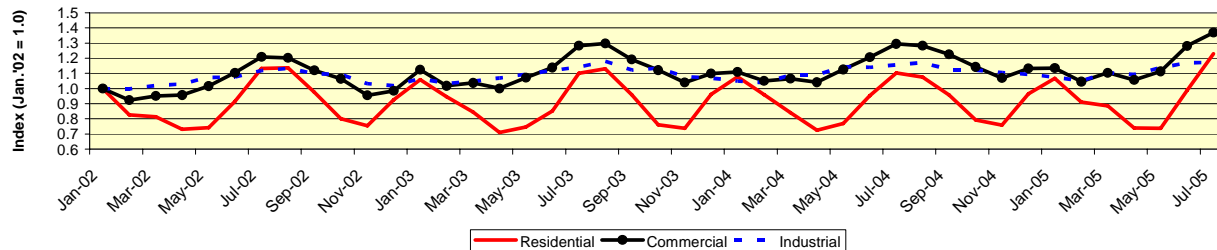
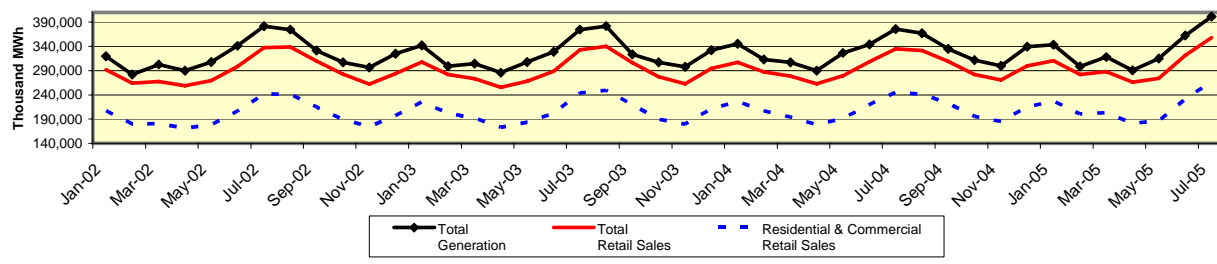


Figure 7.3
Trends in Total Generation and Retail Sales of Electricity



Section 8. Average Retail Price Trends

Data for:
July 2005

**Table 8.1 Trends in Average Retail Price of Electricity (All Sectors)
Cents Per Kilowatthours**

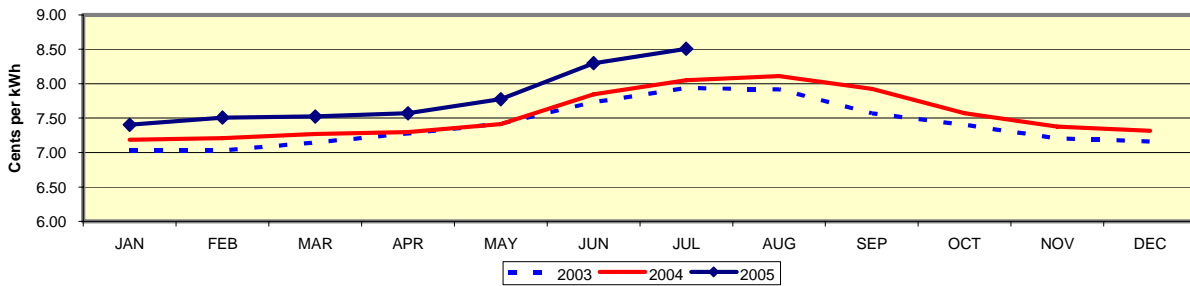
Year-to-Date Comparison

	Starting Month	Ending Month	Residential	Commercial	Industrial	Transportation	Total (All Sectors)
Current Period	January 2005	July 2005	9.19	8.41	5.38	7.28	7.83
Prior Period	January 2004	July 2004	8.82	8.08	5.07	6.37	7.49
Percent Change			4.2%	4.1%	6.1%	14.3%	4.5%

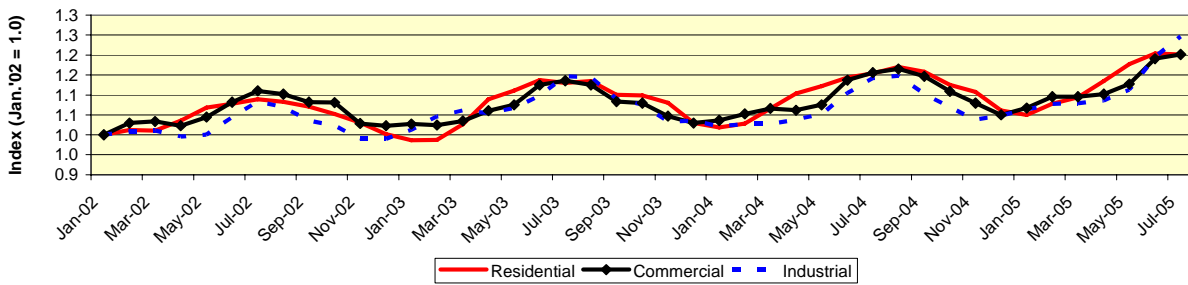
Comparison to Prior 12 Month Period

	Starting Month	Ending Month	Residential	Commercial	Industrial	Transportation	Total (All Sectors)
Current Period	August 2004	July 2005	9.15	8.35	5.29	7.02	7.77
Prior Period	August 2003	July 2004	8.82	8.05	5.10	6.84	7.48
Percent Change			3.7%	3.7%	3.7%	2.6%	3.9%

**Figure 8.1 Trends in Average Retail Price of Electricity (All Sectors):
2003, 2004, and 2005**



**Figure 8.2 Average Retail Price of Electricity Trends by Ultimate Customer
(Values as Indices, Jan. 2002 = 1.0)**



Section 9. Heating and Cooling Degree Days

Data for:
July 2005

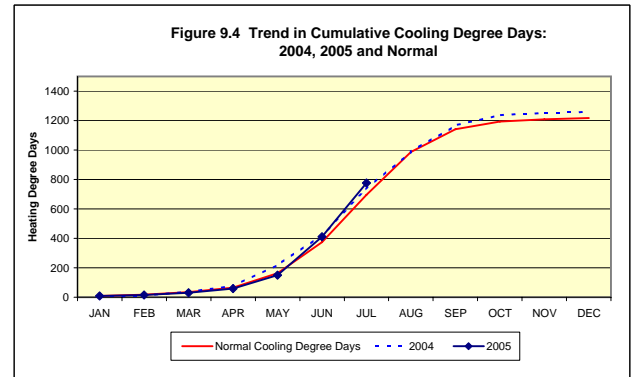
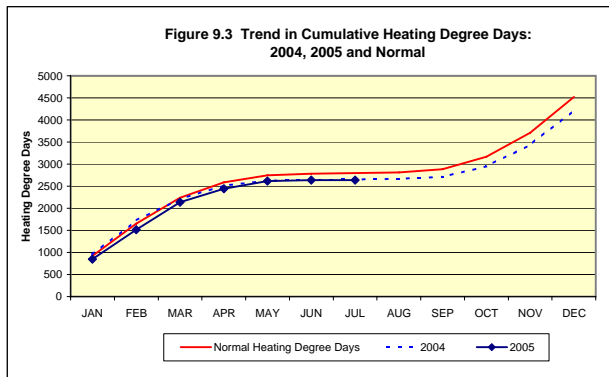
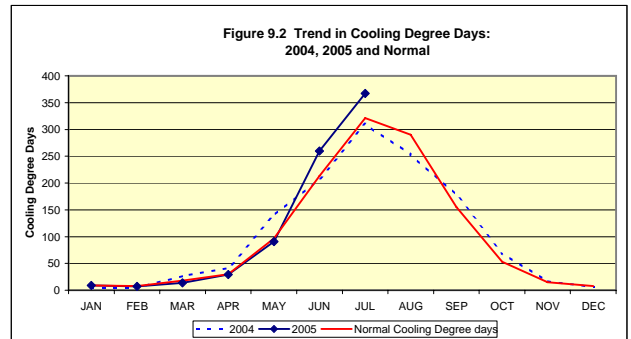
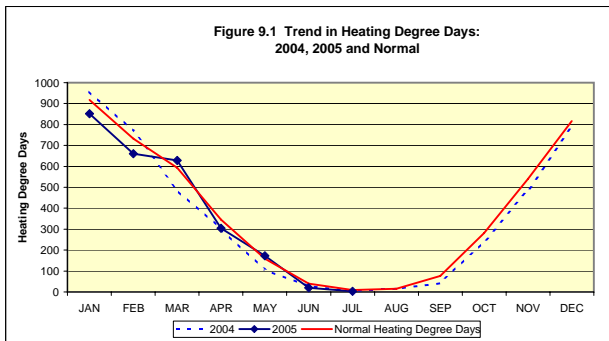
Table 9.1 Degree Days

	Month	Heating Degree Days			Cooling Degree Days		
		Heating Degree Days	Normal Heating Degree Days	Deviation From the Normal	Cooling Degree Days	Normal Cooling Degree Days	Deviation From the Normal
Current Period	July 2005	3	9	-6	367	321	46
Previous Period	July 2004	5	9	-4	310	321	-11
Percent Change		-40.0%			18.4%		

Table 9.2 Trends in Heating and Cooling Degree Days

Year-to-Date Comparison				
	Starting Month	Ending Month	Heating Degree Days	Cooling Degree Days
Current Period	January 2005	July 2005	2,641	777
Prior Period	January 2004	July 2004	2,653	735
Percent Change			-0.5%	5.7%

Comparison to Prior 12 Month Period				
	Starting Month	Ending Month	Heating Degree Days	Cooling Degree Days
Current Period	August 2004	July 2005	4,212	1,301
Prior Period	August 2003	July 2004	4,216	1,314
Percent Change			-0.1%	-1.0%



General: The *Monthly Flash Estimates of Electric Power Data* ("Flash Estimates") is prepared by the Electric Power Division, Office of Coal, Nuclear, Electric and Alternate Fuels, Energy Information Administration (EIA), U.S. Department of Energy. Data published in the *Flash Estimates* are compiled from the following sources: Form EIA-826, "Monthly Electric Utility Sales and Revenues with State Distributions Report," Form EIA-906, "Power Plant Report," and Form EIA-920, "Combined Heat and Power Plant Report."

The survey data is collected monthly from a statistically-derived sample of power plants and electricity retailers. The nominal sample sizes are: for the Form EIA-826, approximately 450 electric utilities and other energy service providers; for the Form EIA-920, approximately 300 combined heat and power (CHP) plants; and for the Form EIA-906, approximately 1,440 non-CHP plants. With the exception of stocks, a regression-based method is used to estimate totals from the sample. Essentially complete samples are collected for the *Electric Power Monthly*, which includes State-level values. The *Flash Estimates* is based on an incomplete sample and includes only national-level estimates. Stocks data for out-of-sample plants and any monthly non-respondents are estimated by bringing forward the last reported value for a plant.

For complete documentation on EIA monthly electric data collection and estimation, see the Technical Notes to the *Electric Power Monthly*, at: <http://www.eia.doe.gov/cneaf/electricity/epm/epm.pdf>. Values displayed in the *Flash Estimates* may differ from values published in the *Electric Power Monthly* due to independent rounding. This report represents the EIA's initial release for national level electricity data. Updated information will be released in the *Electric Power Monthly*.

Sector definitions: The Electric Power Sector comprises electricity-only and CHP plants within the North American Industrial Classification System 22 category whose primary business is to sell electricity, or electricity and heat, to the public (i.e., electric utility plants and Independent Power Producers (IPP), including IPP plants that operate as combined heat and power producers). The All Sectors totals include the Electric Power Sector and the Commercial and Industrial sectors (Commercial and Industrial power producers are primarily CHP plants).

Composition of fuel categories: See notes on page 3.

Degree Days: Notes: Degree-days are relative measurements of outdoor air temperature used as an index for heating and cooling energy requirements. Heating degree-days are the number of degrees that the daily average temperature falls below 65° F. Cooling degree-days are the number of degrees that the daily average temperature rises above 65° F. The daily average temperature is the mean of the maximum and minimum temperatures in a 24-hour period. For example, a weather station recording an average daily temperature of 40° F would report 25 heating degree-days for that day (and 0 cooling degree-days). If a weather station recorded an average daily temperature of 78° F, cooling degree-days for that station would be 13 (and 0 heating degree days).