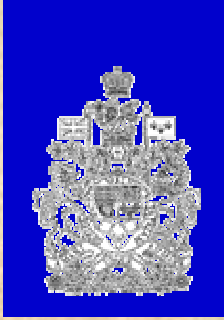


National Energy
Board



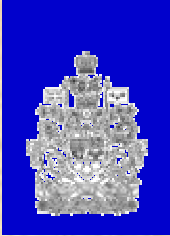
Office national
de l'énergie

Canadian Gas Supply 1980 - 2025

**National Energy Modeling System
Annual Energy Outlook
March 23, 2004**

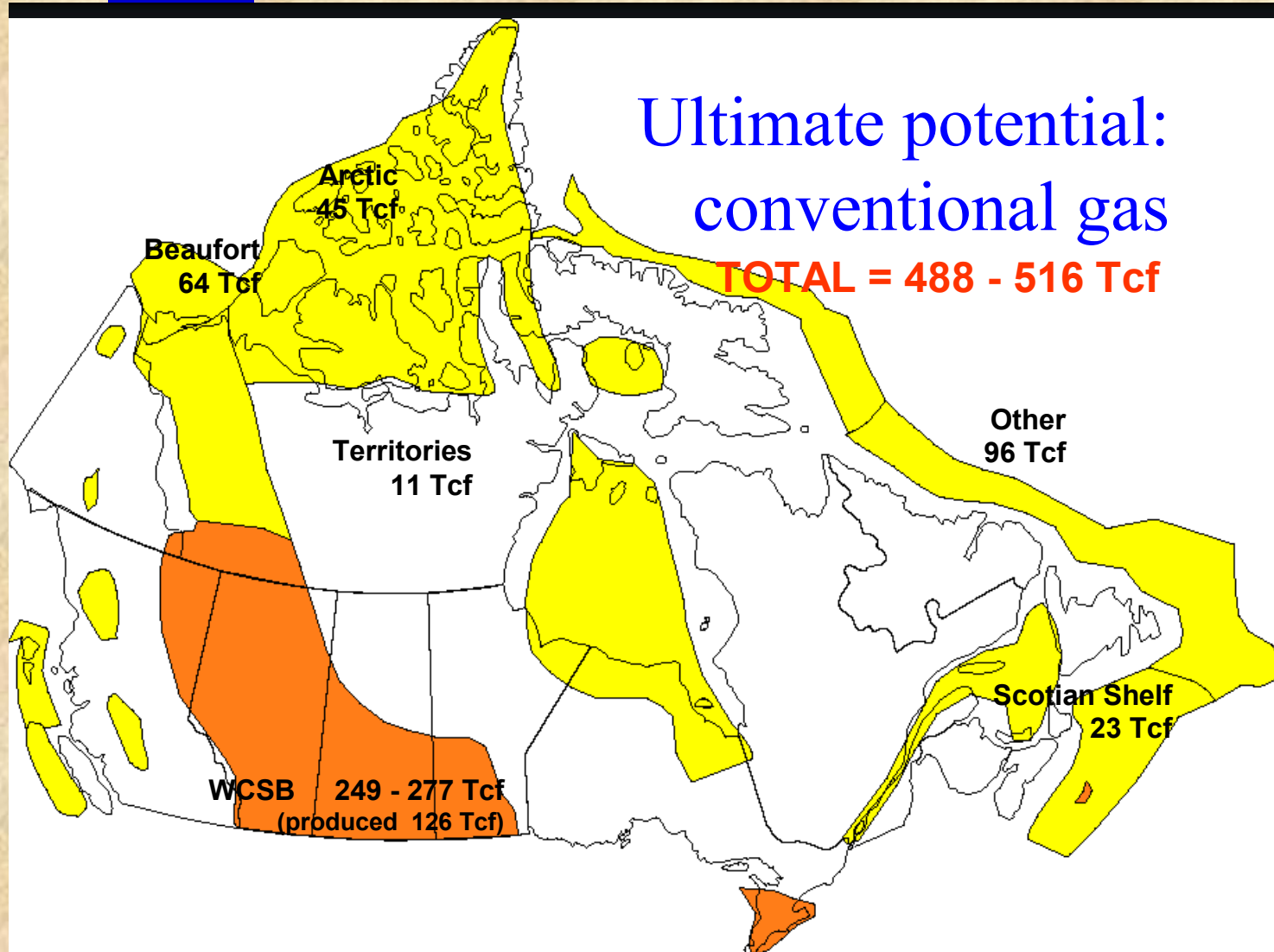
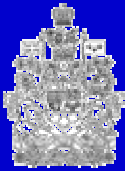
**Joe Lemée
Supply Specialist
National Energy Board**

Canada 

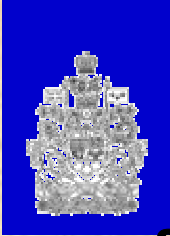


Outline

- **Historical Review**
- **Supply and Markets Background**
- **NEB Supply & Demand Report**
- **Issues and Implications**
- **Concluding Remarks**

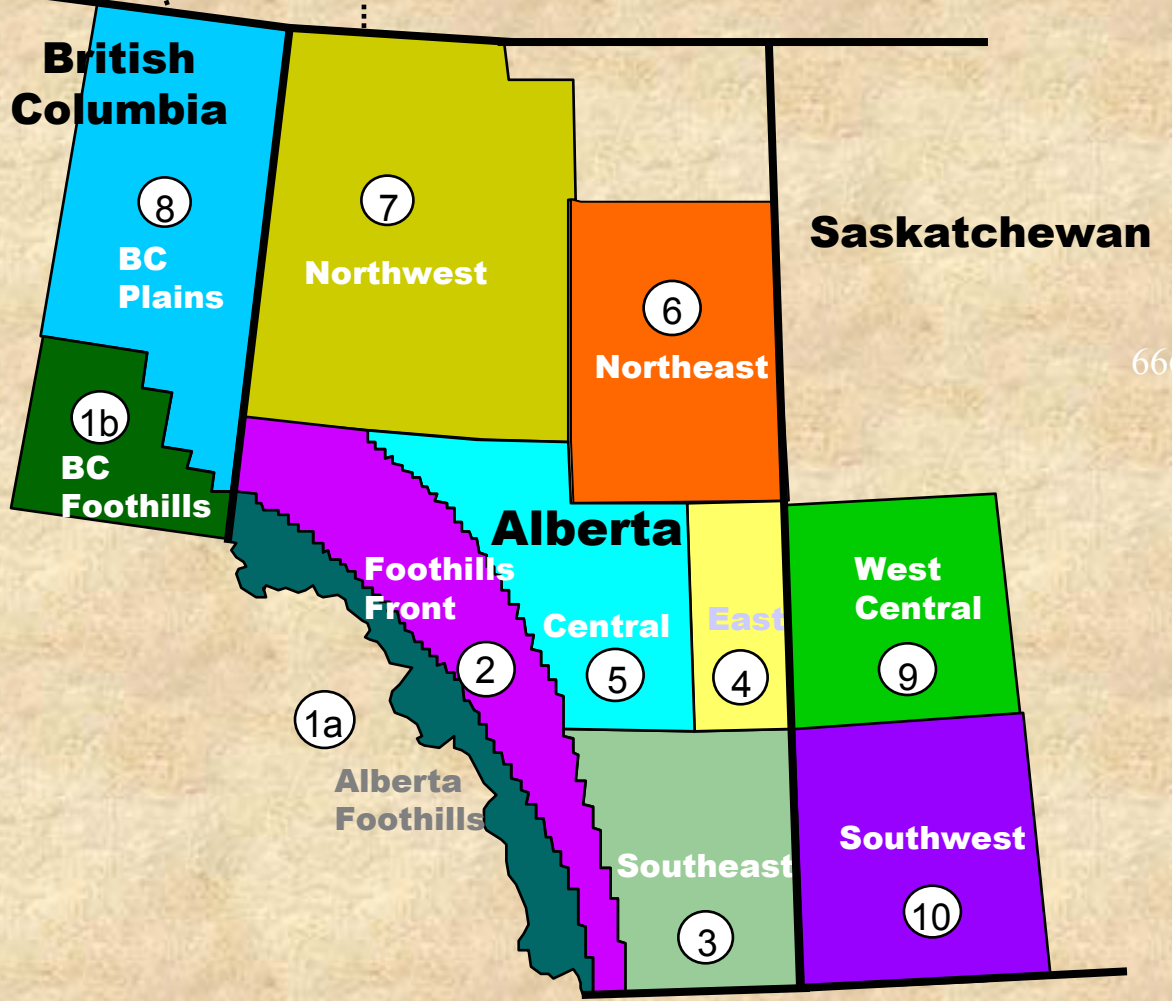


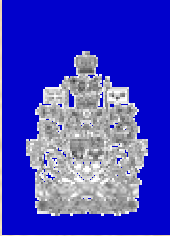
National Energy Board



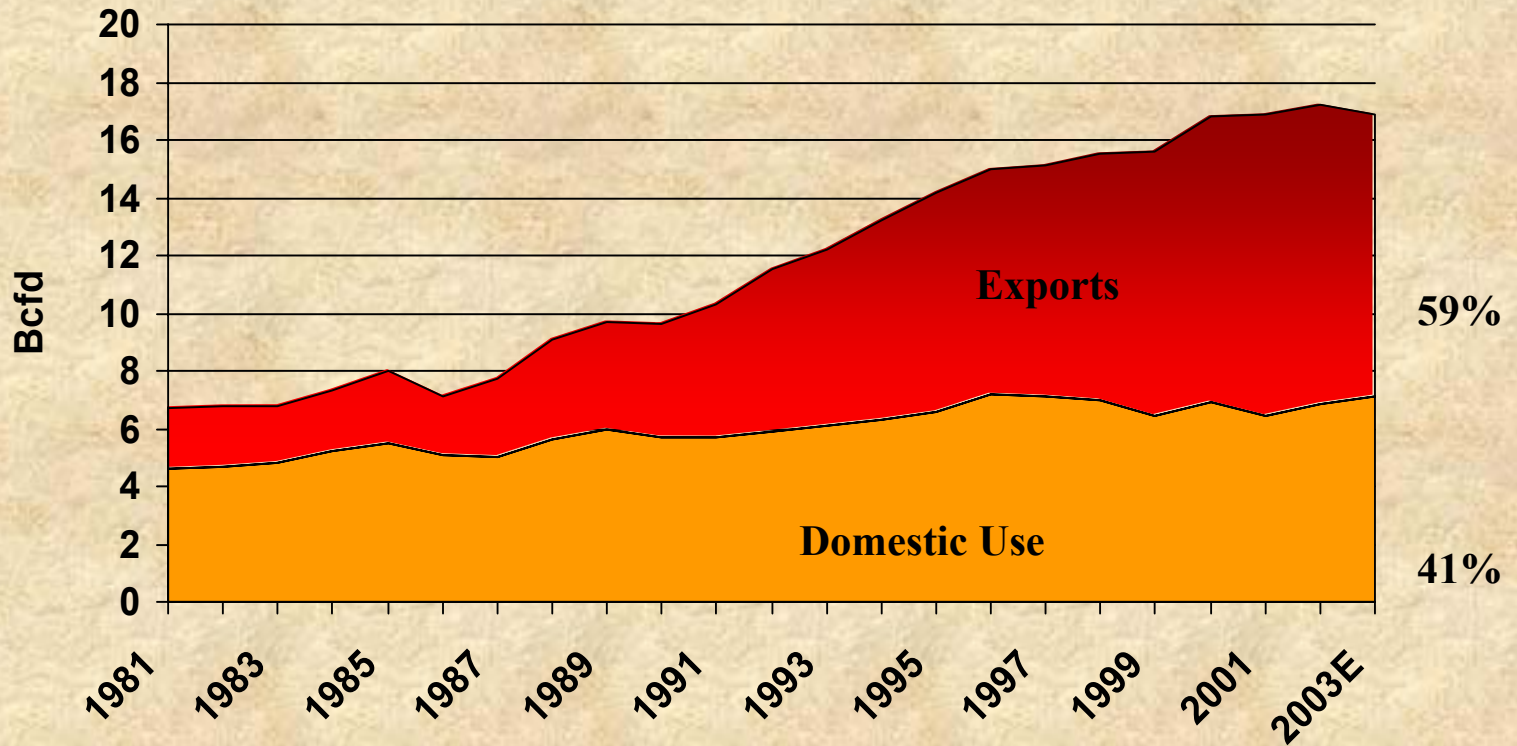
Office national de l'énergie

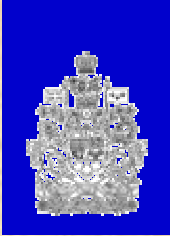
Southern Territories



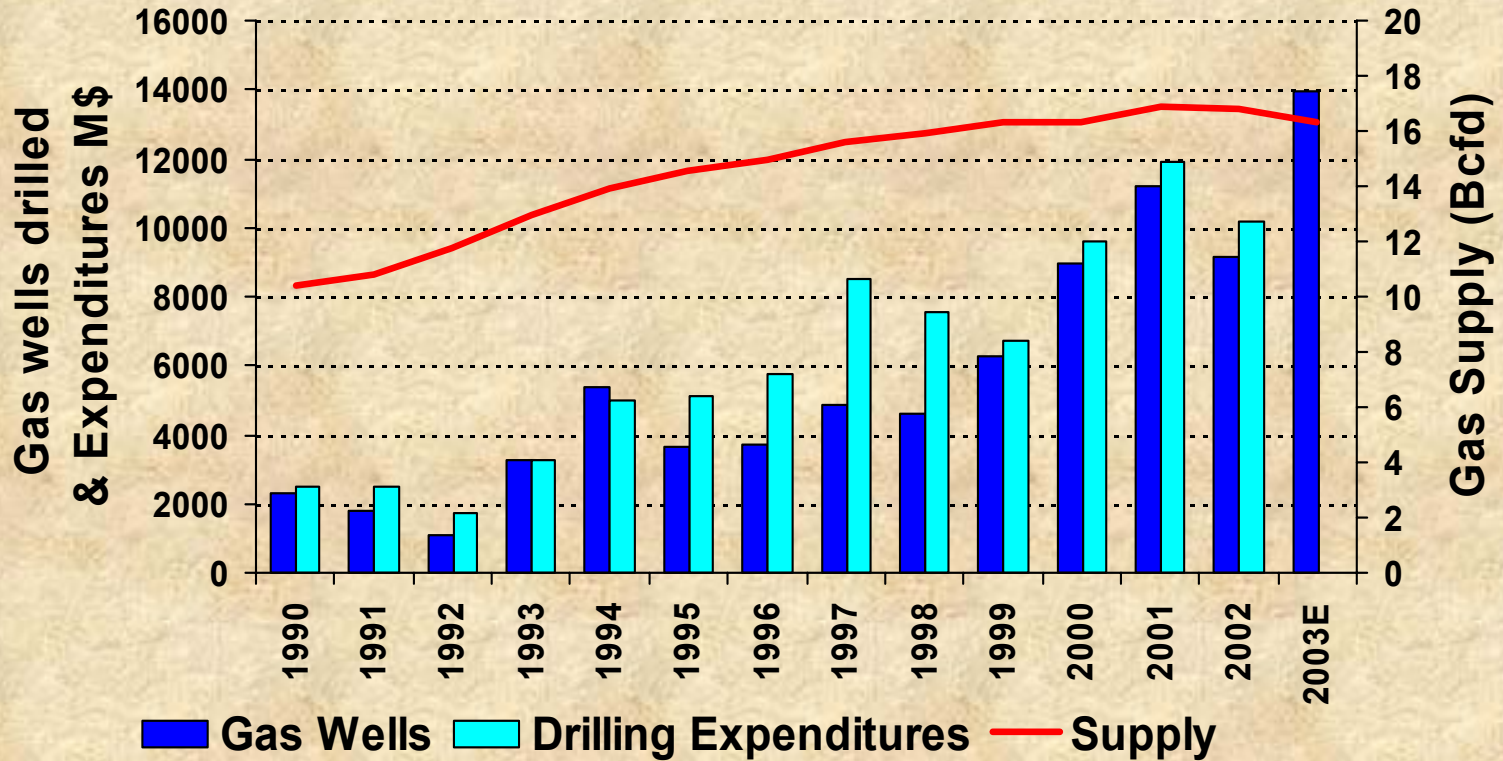


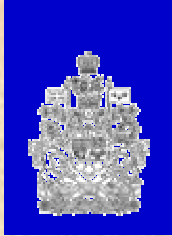
Canadian Gas Sales





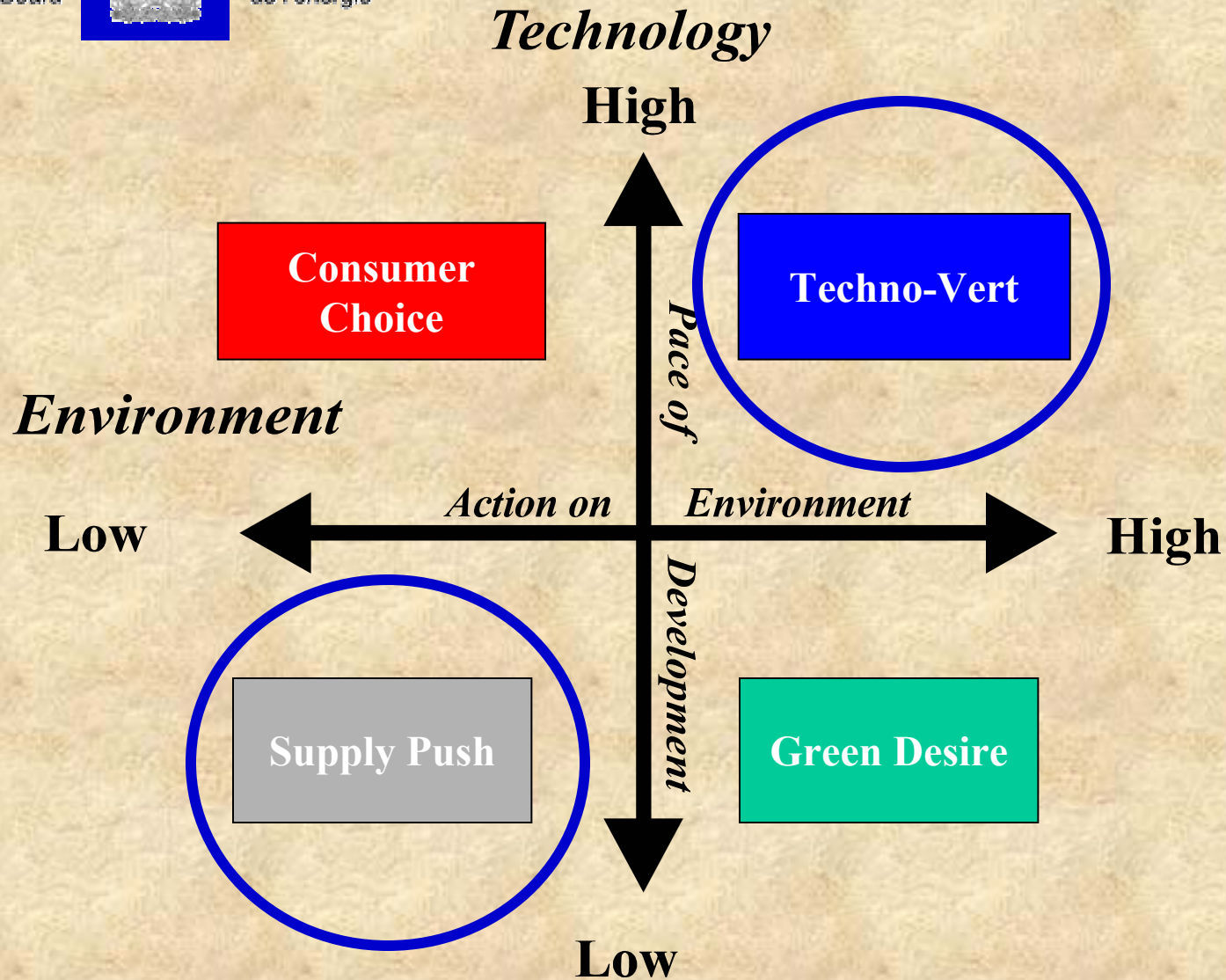
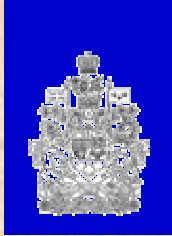
WCSB Supply Response

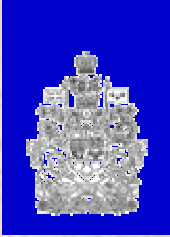




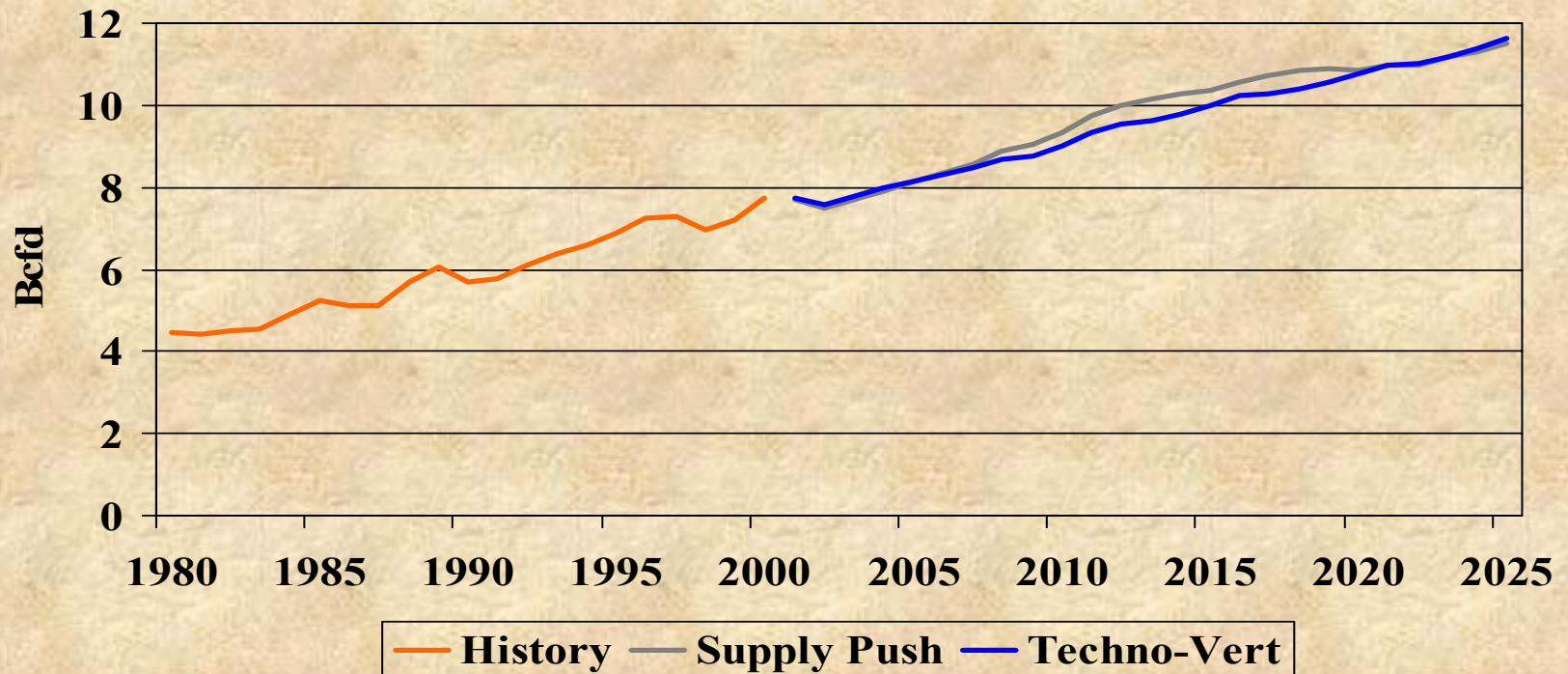
Canada's Energy Future: Scenarios for Supply and Demand to 2025

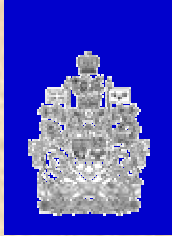
- **Scenario-based approach**
 - **Explore plausible energy futures for Canada**
 - **Not forecasts; provide framework for public discussion**
 - **Identify issues, constraints and key uncertainties**
 - **Two rounds of public consultation**





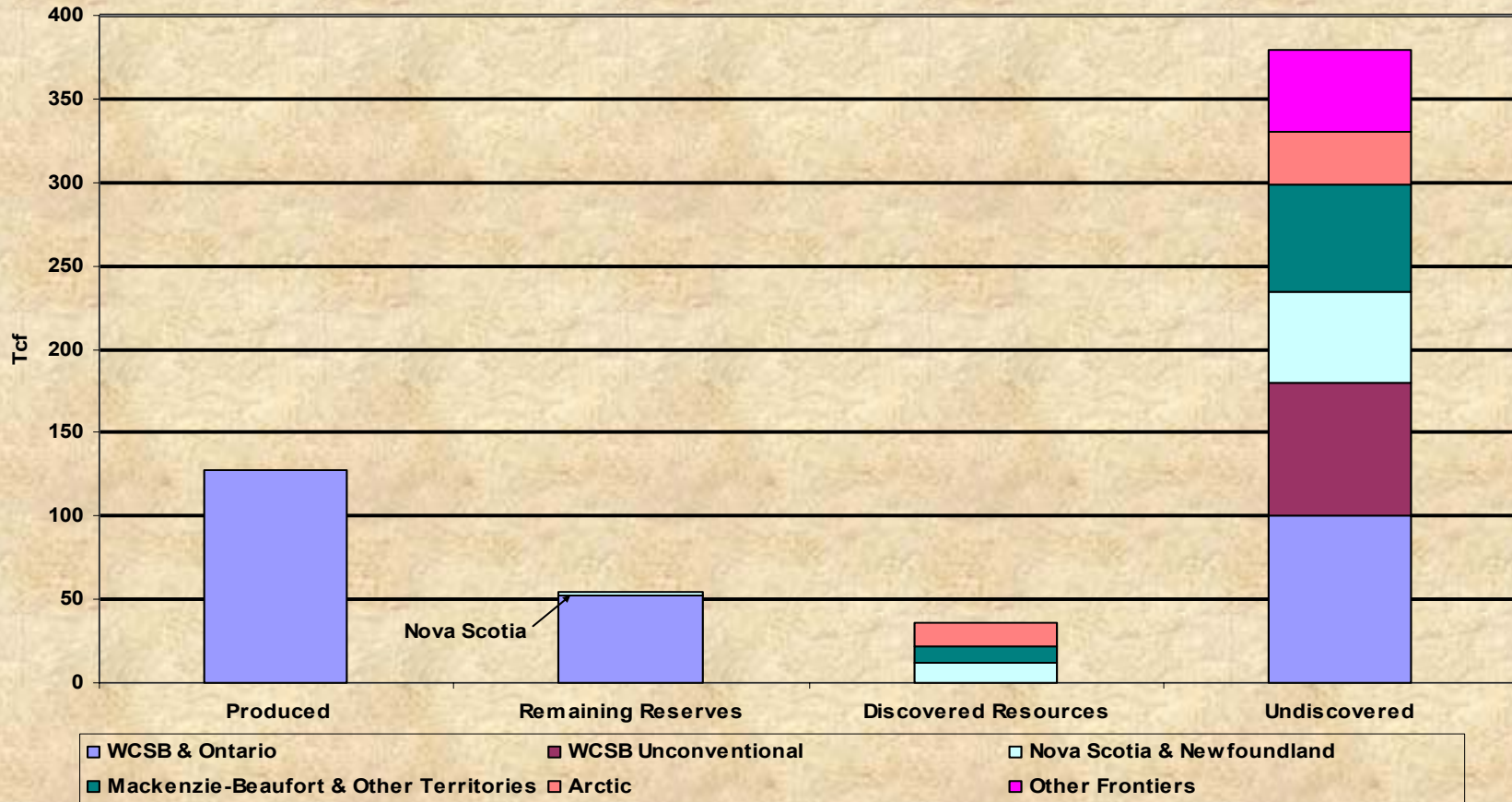
Natural Gas Demand Scenarios for Canada

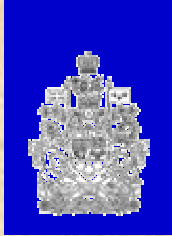




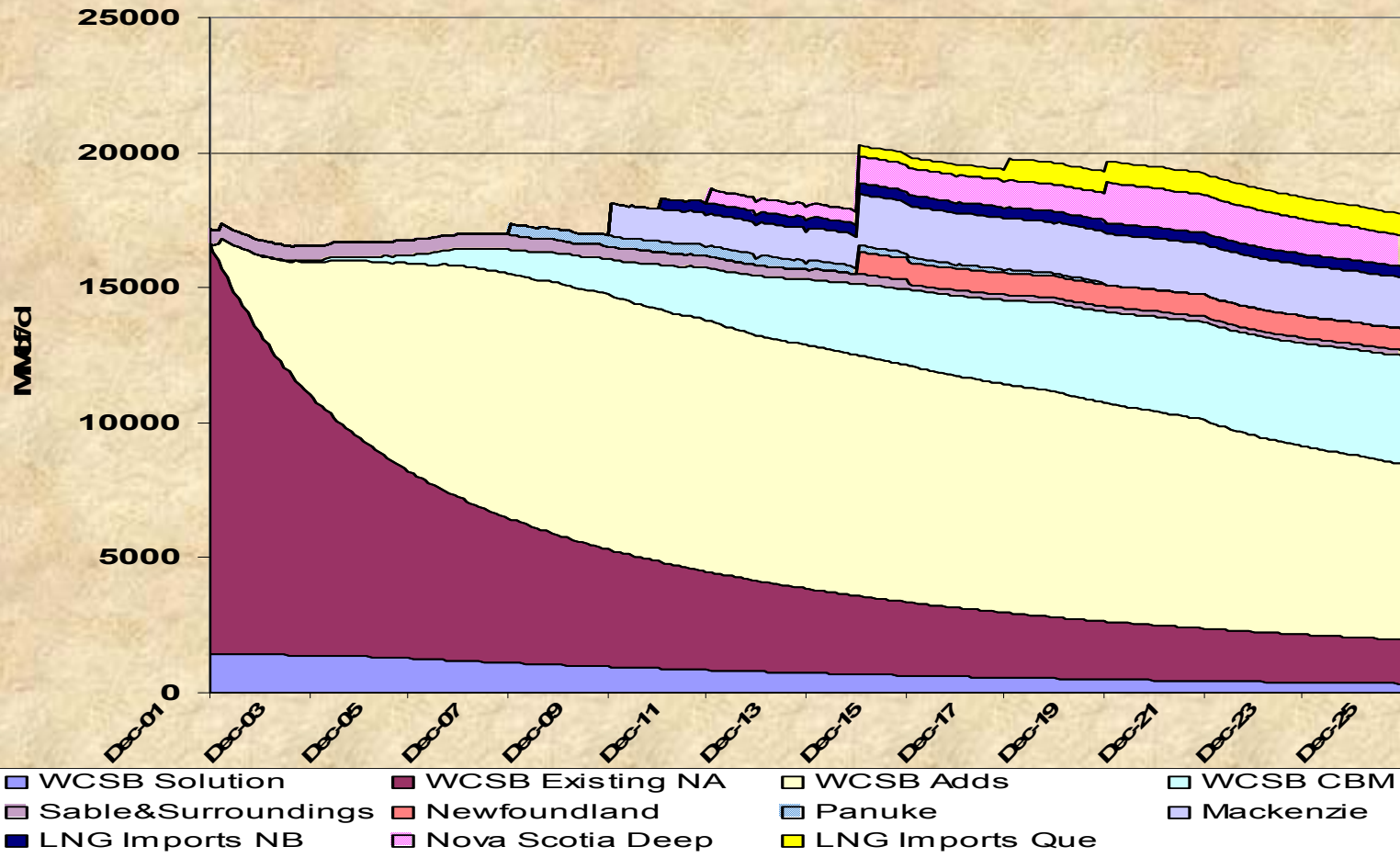
Natural Gas Resources in Canada

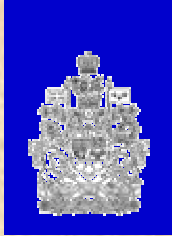
Techno-vert Scenario: 596 Tcf



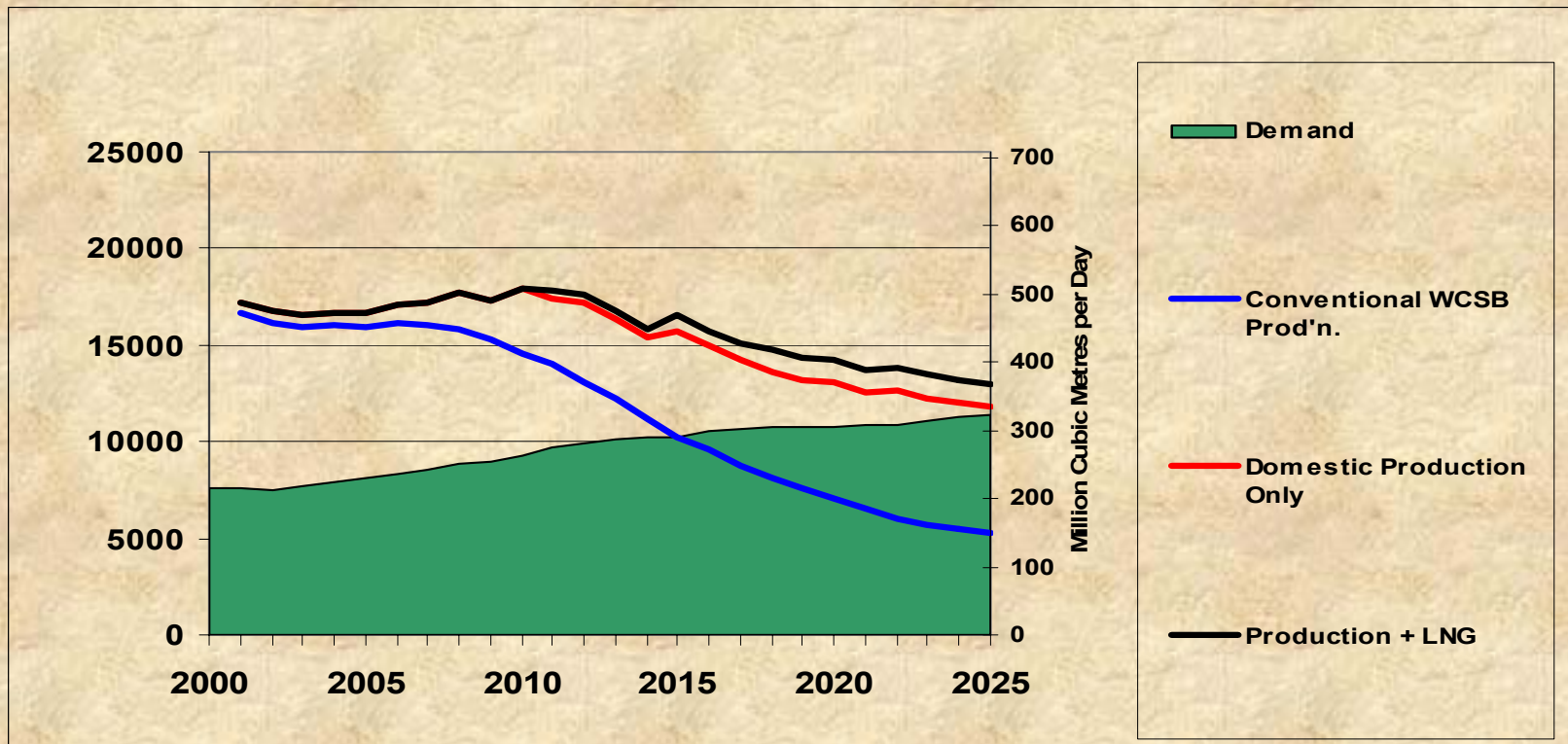


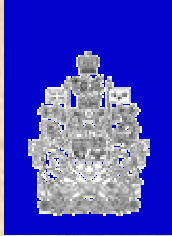
Natural Gas Deliverability – Techno-Vert



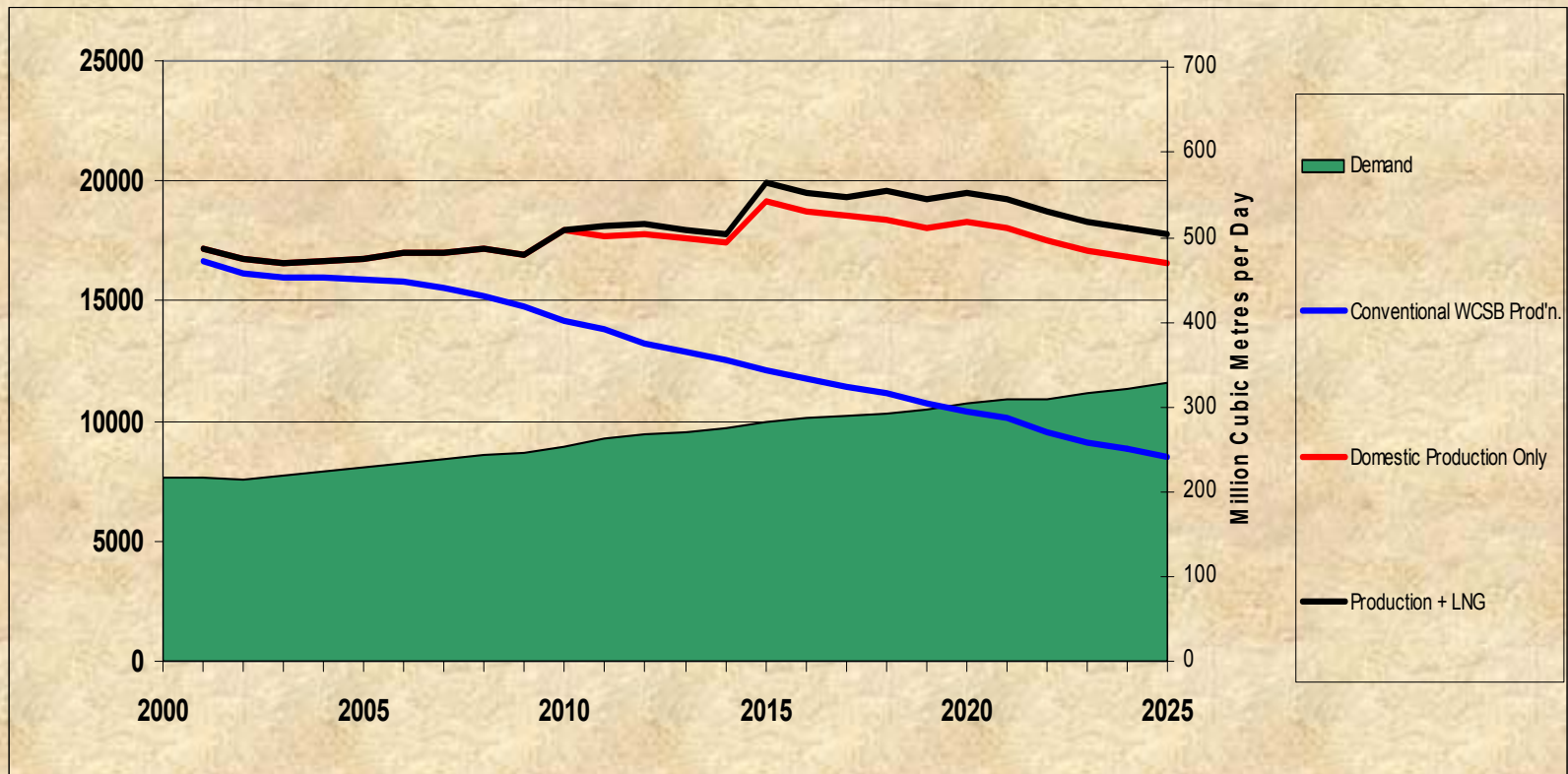


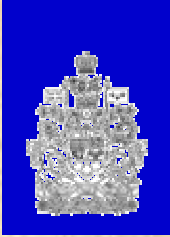
Canadian Gas Supply vs. Domestic Demand Supply Push (MMcf/d)





Canadian Gas Supply vs. Domestic Demand Techno-Vert (MMcf/d)

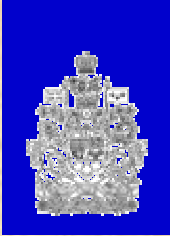




Key Gas Supply Issues & Uncertainties

- **Size of the WCSB resource base**
- **Exploration success onshore/offshore**
- **Amount and timing of gas from the north**
- **Success of CBM**
- **LNG help regional balances**

**Key Challenge: meeting Canada's
growing gas demand**



Looking forward...

- **WCSB**
 - ◆ Major contributor
 - ◆ Fairly mature
 - ◆ Considerable activity to maintain rates

- **East Coast continuing to develop**
 - ◆ Sable expansion
 - ◆ Deep Panuke
 - ◆ Deeper water projects

- **Northern Gas**

- **Coalbed Methane**

- **LNG**