

The Expanding Role of Liquefied Natural Gas

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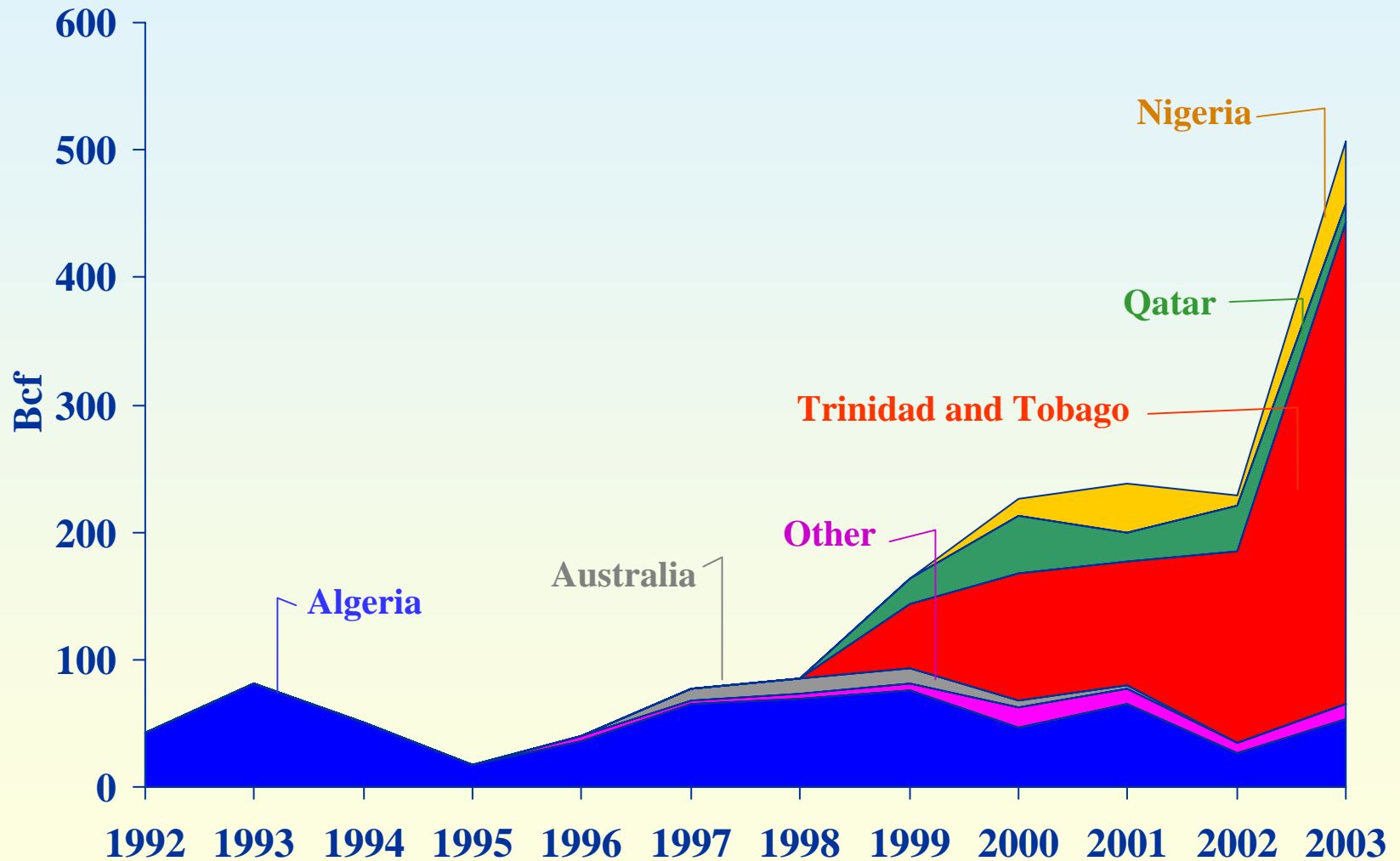


National Energy Modeling System
Annual Energy Outlook Conference

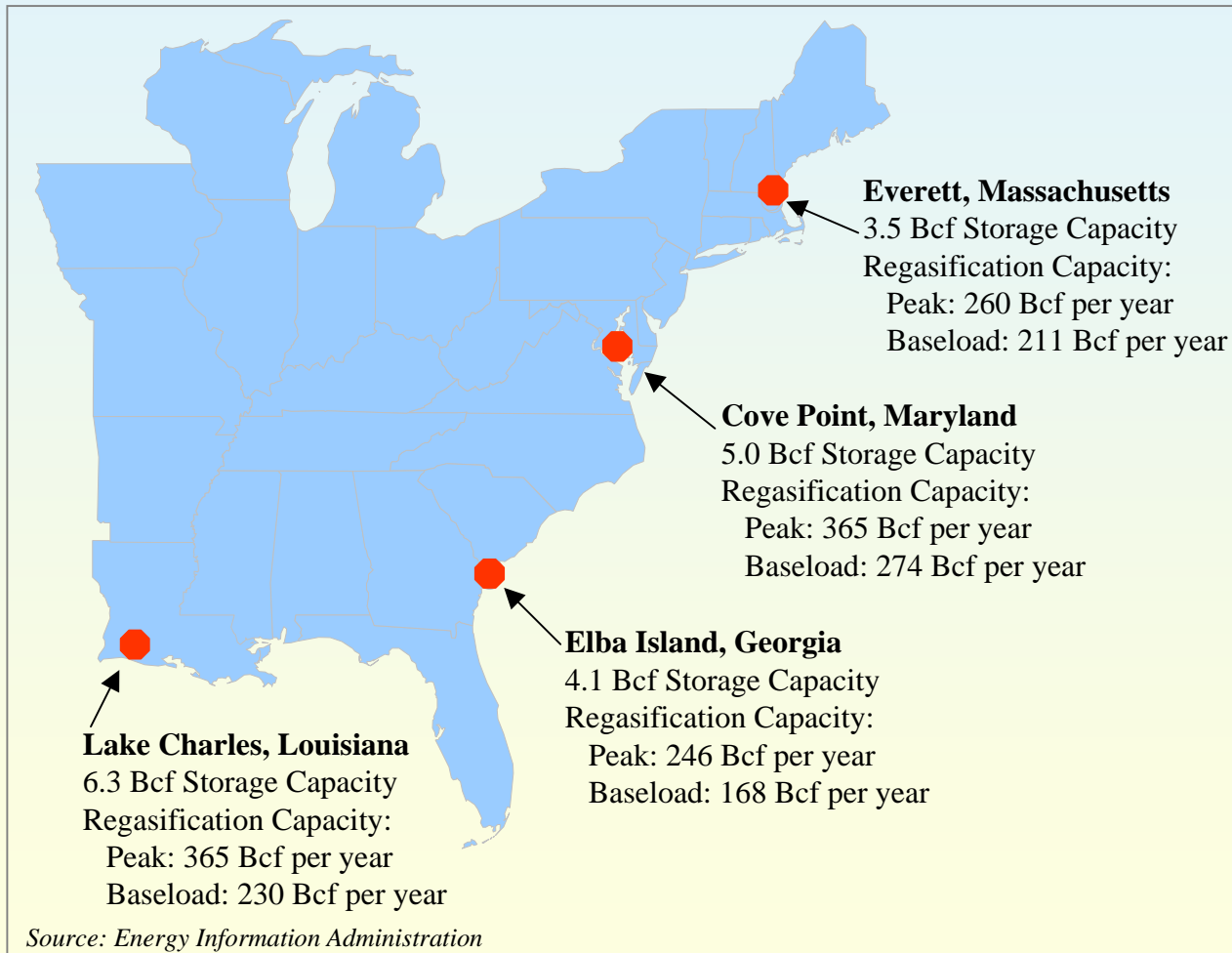
Washington, DC

March 23, 2004

U.S. LNG Imports by Country, 1992-2003



Current U.S. LNG Import Terminals

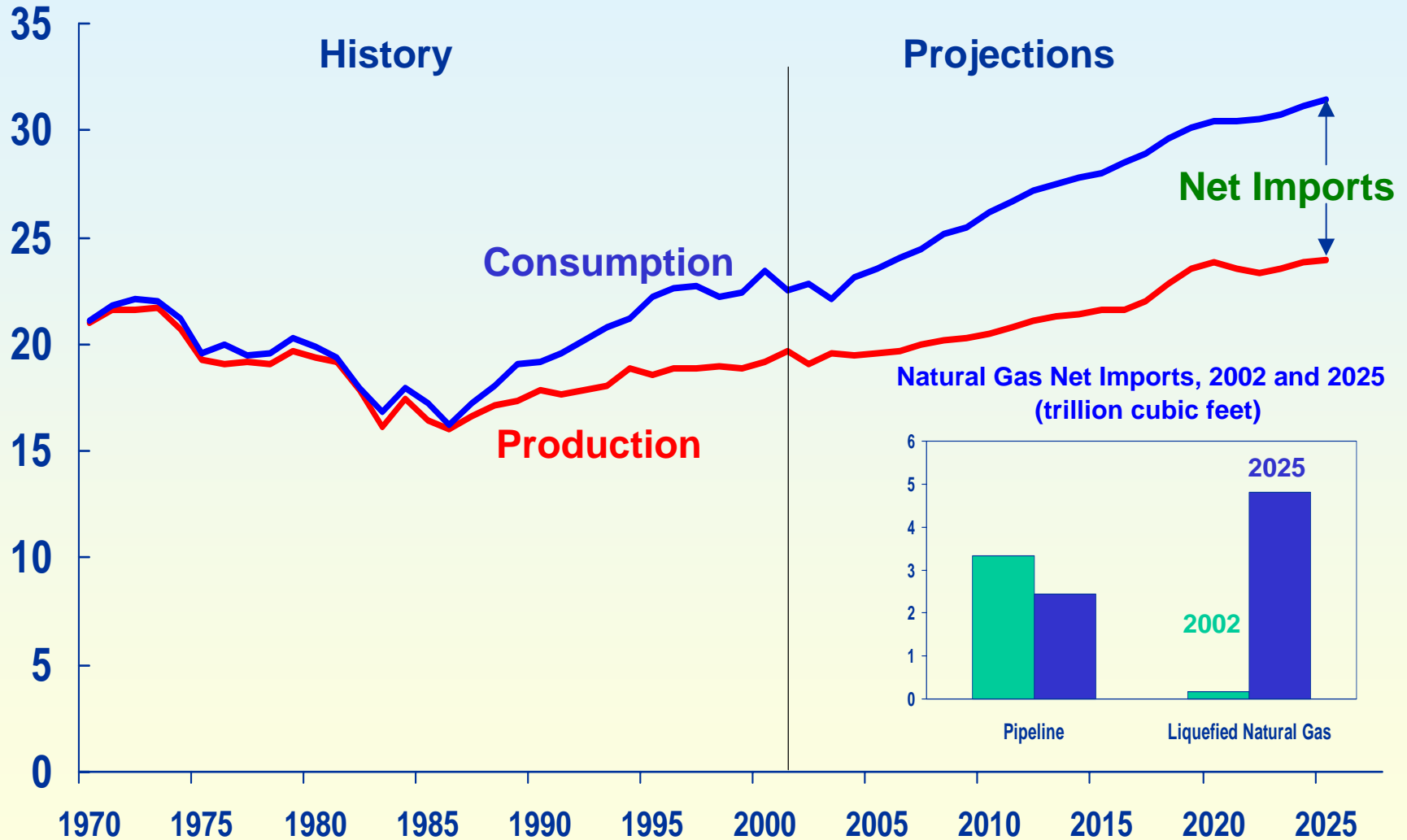


Proposed New LNG Import Terminals

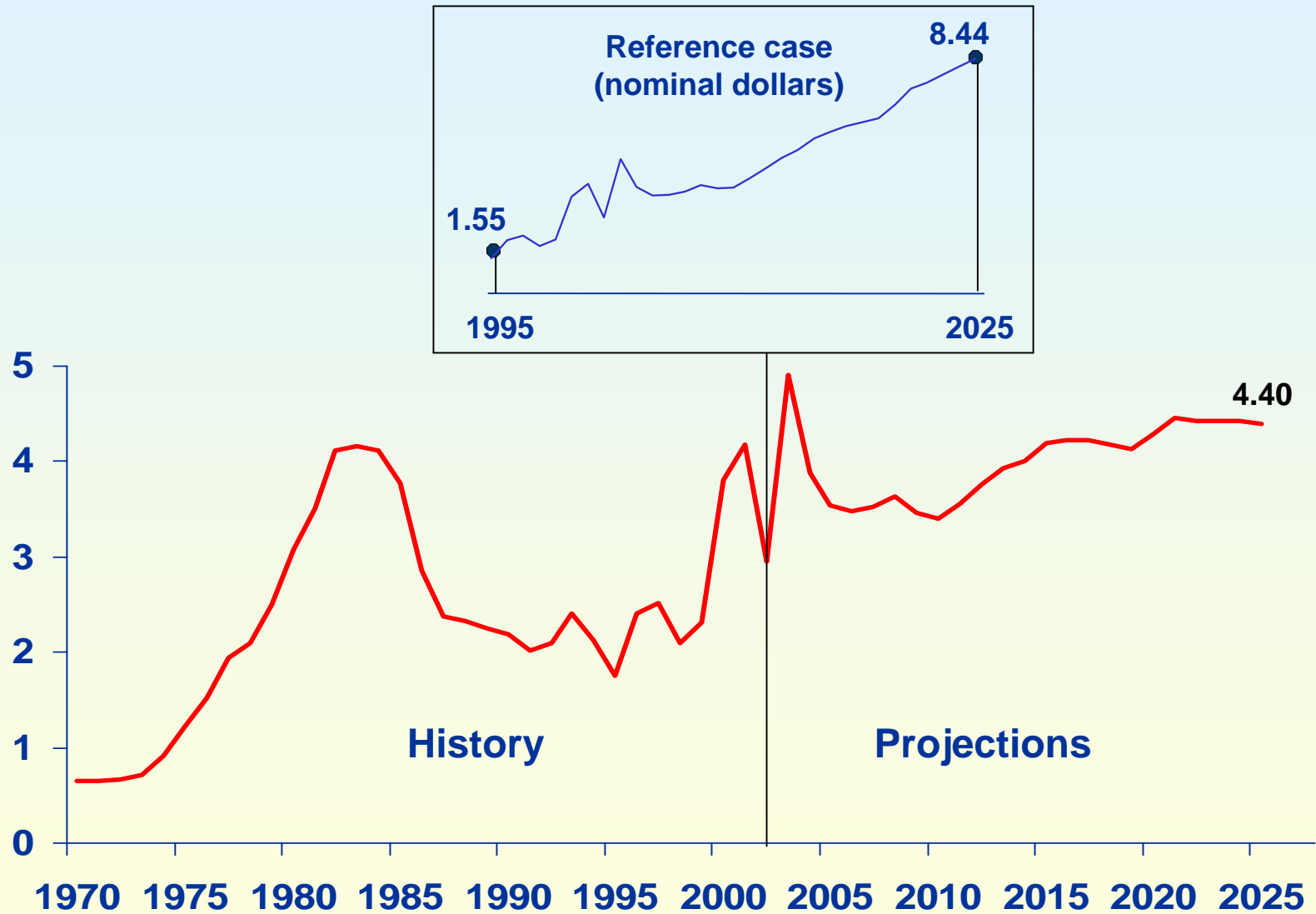


Source: Energy Information Administration

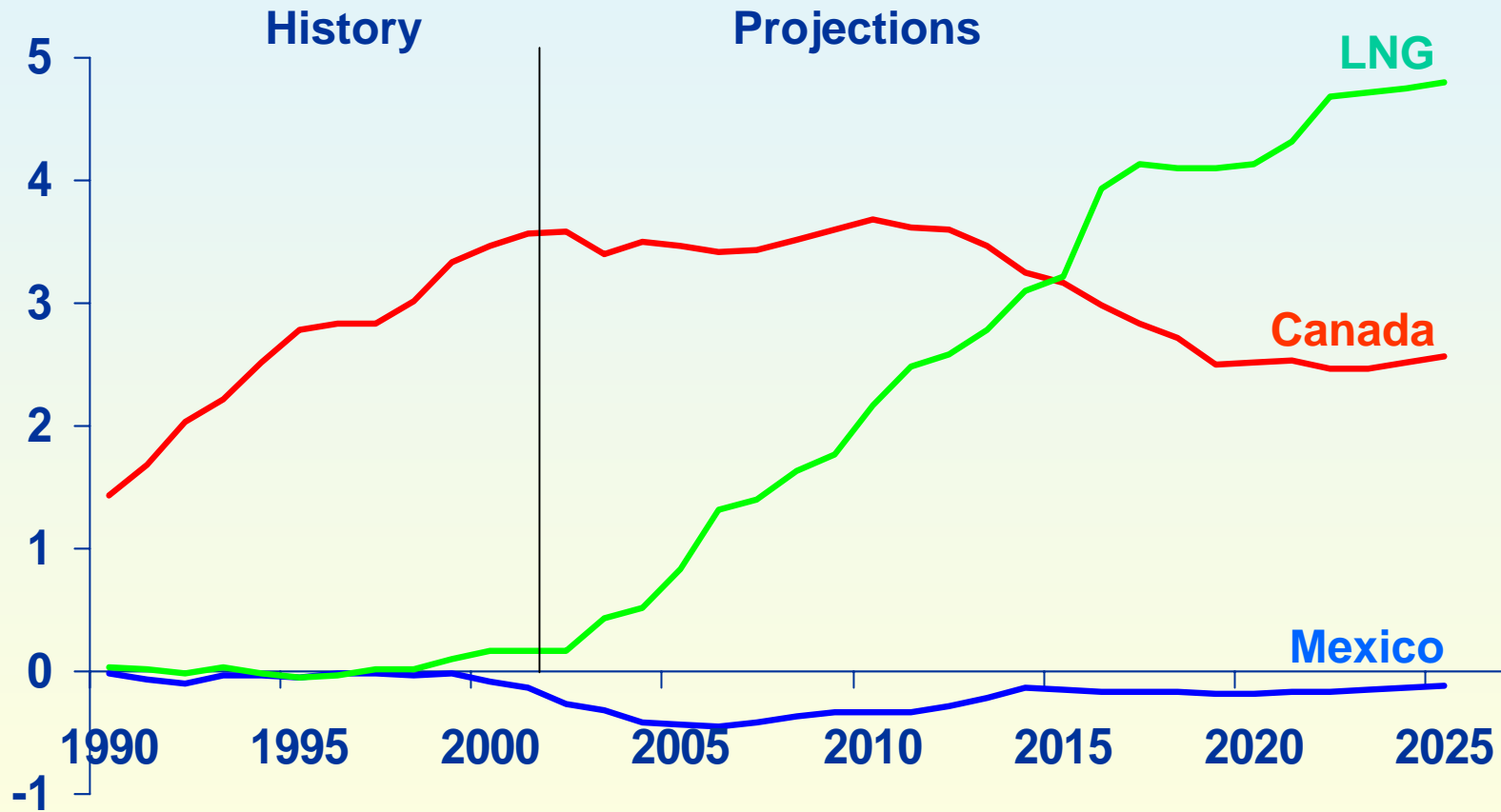
Natural Gas Production, Consumption, and Imports, 1970 - 2025 (trillion cubic feet)



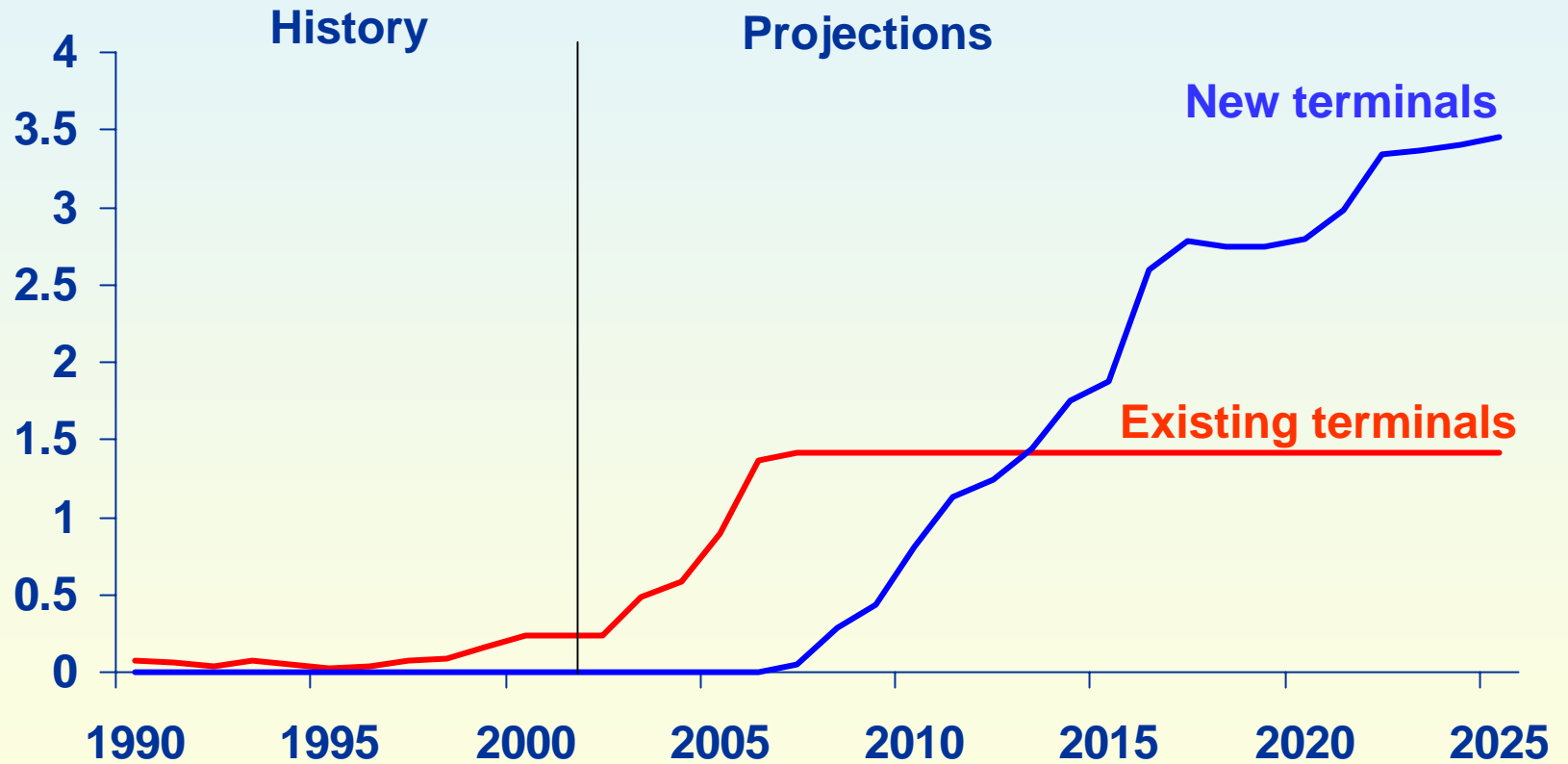
Lower 48 Natural Gas Wellhead Prices, 1970-2025 (2002 dollars per thousand cubic feet)



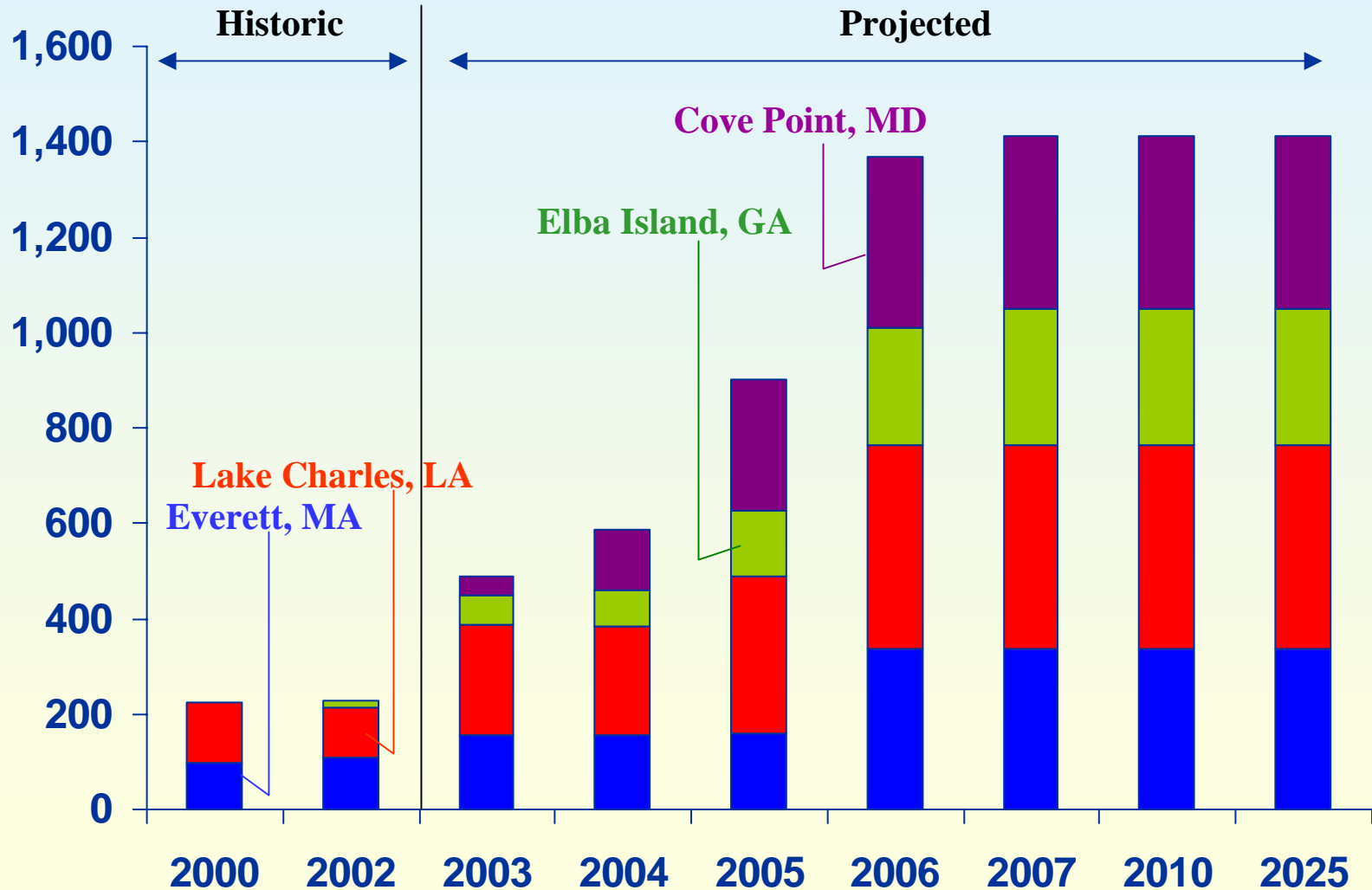
U.S. Natural Gas Net Imports, 1990-2025 (trillion cubic feet)



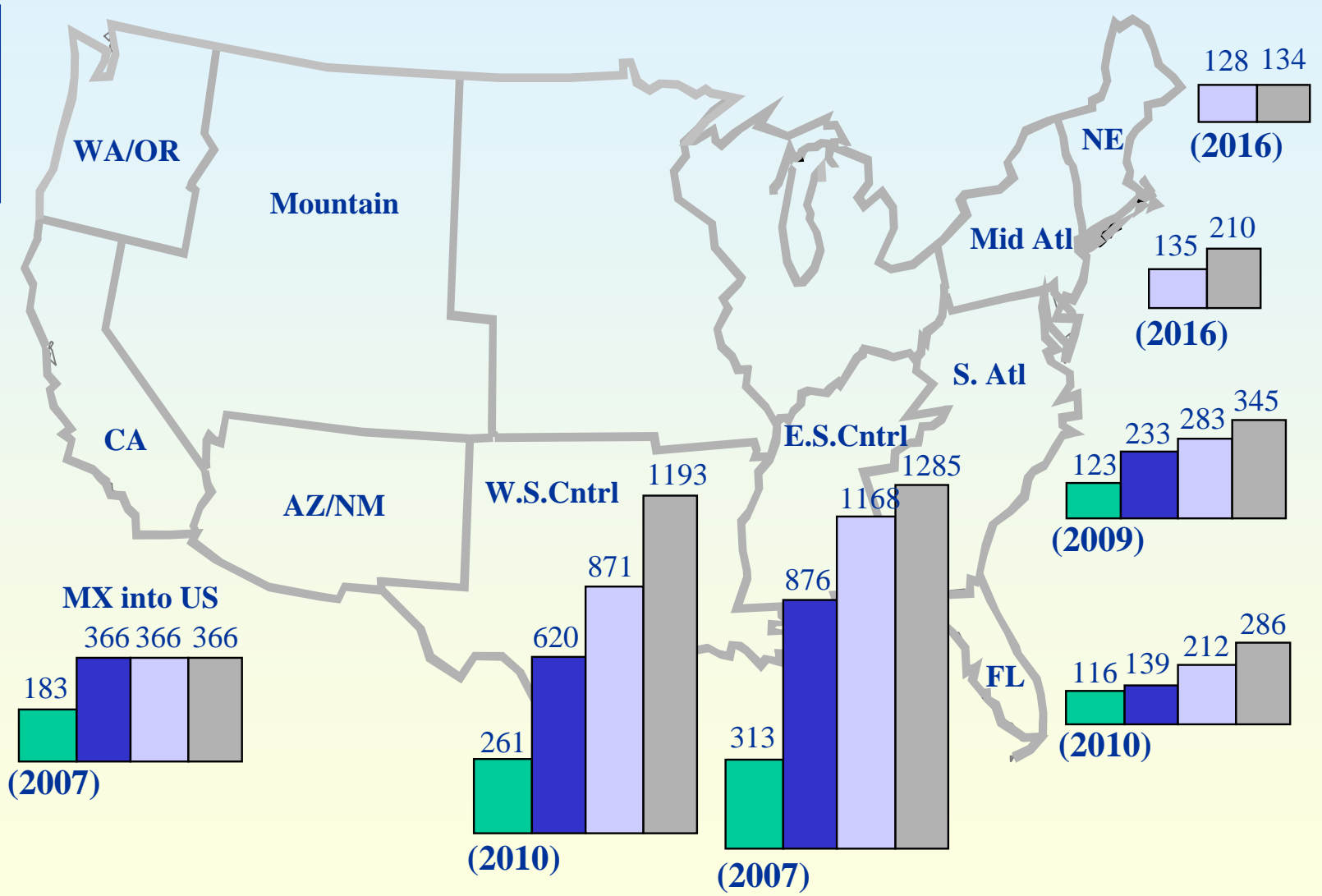
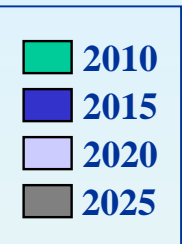
U.S. LNG Imports, 1990-2025 (trillion cubic feet)



LNG Imports at Existing Terminals, 2000-2025 (billion cubic feet)

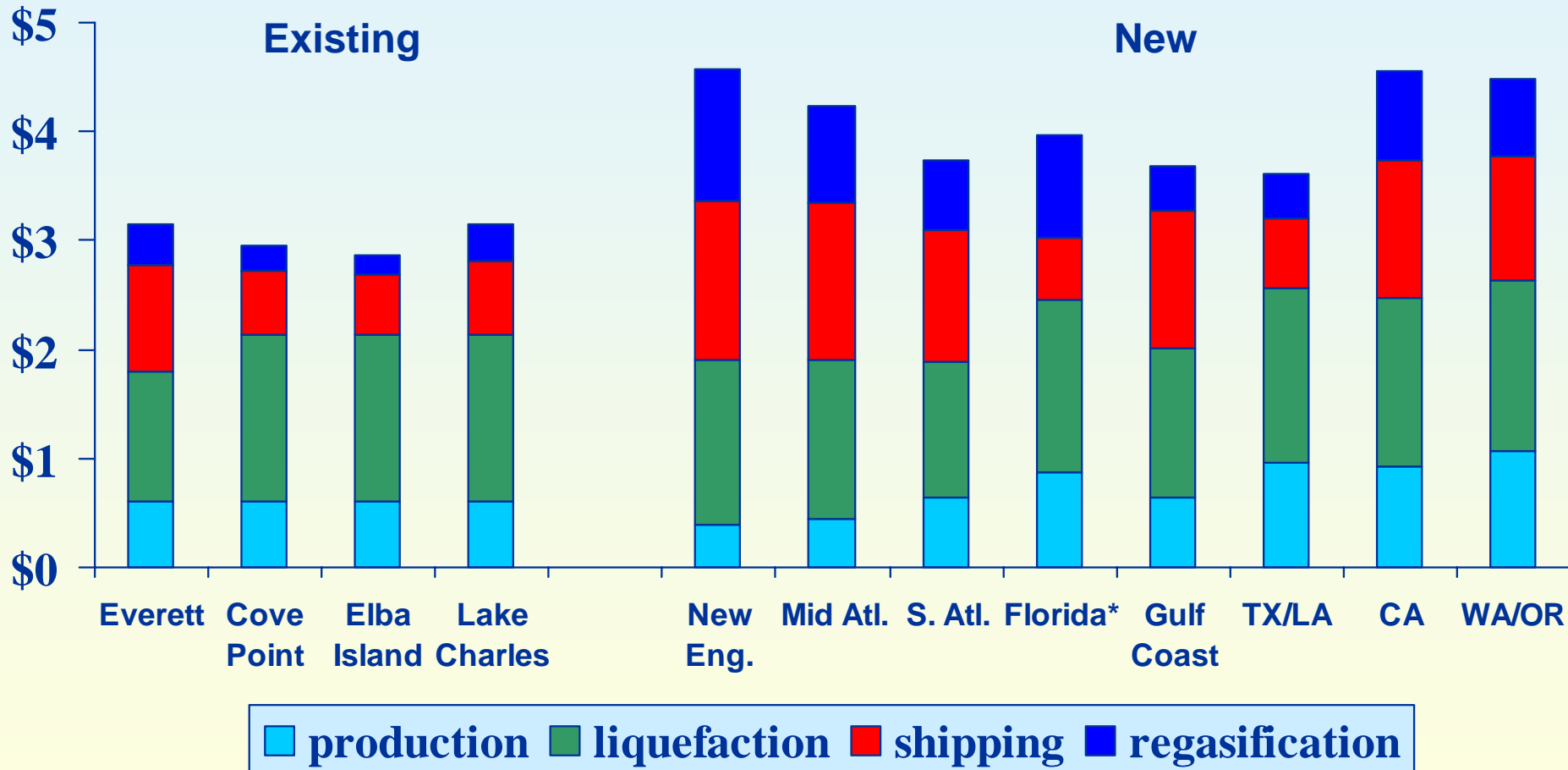


Regional LNG Imports at New Terminals, 2010, 2015, 2020, and 2025 (billion cubic feet)



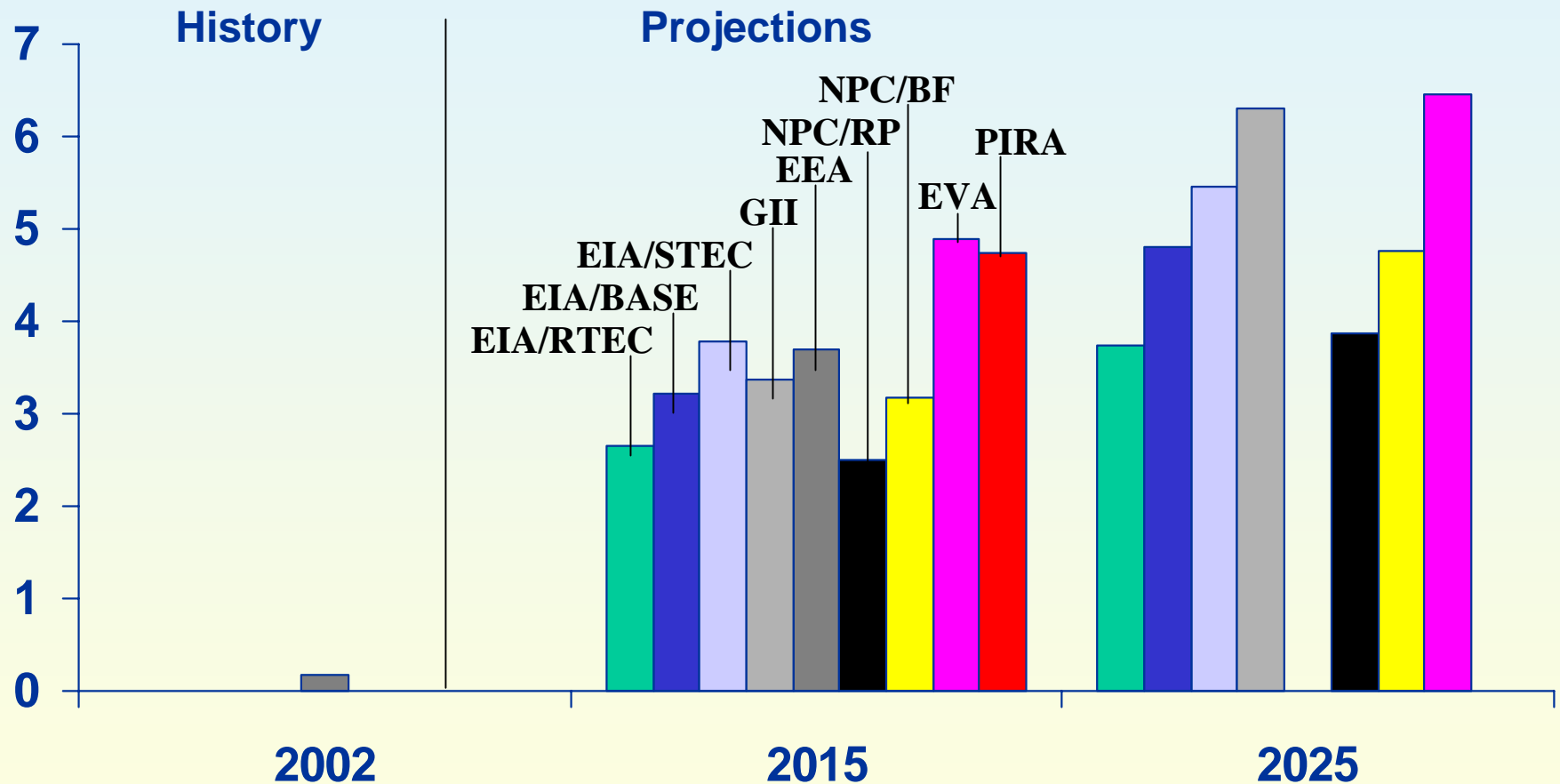
(20xx) – Start year of first new terminal

Components of Regional LNG trigger price in year of expansion/construction, (2002 dollars per thousand cubic feet)



* Regasification includes pipeline cost from Bahamas

Comparison of Net LNG Import Forecasts (trillion cubic feet)



Annual Energy Outlook 2004, December 16, 2003

Short-term Energy Outlook, monthly

International Energy Outlook 2004, April 14, 2004

Special Reports:

The Global Natural Gas Market: Status and Outlook, December 2003

Analysis of Restricted Natural Gas Supply Cases, February, 2004

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