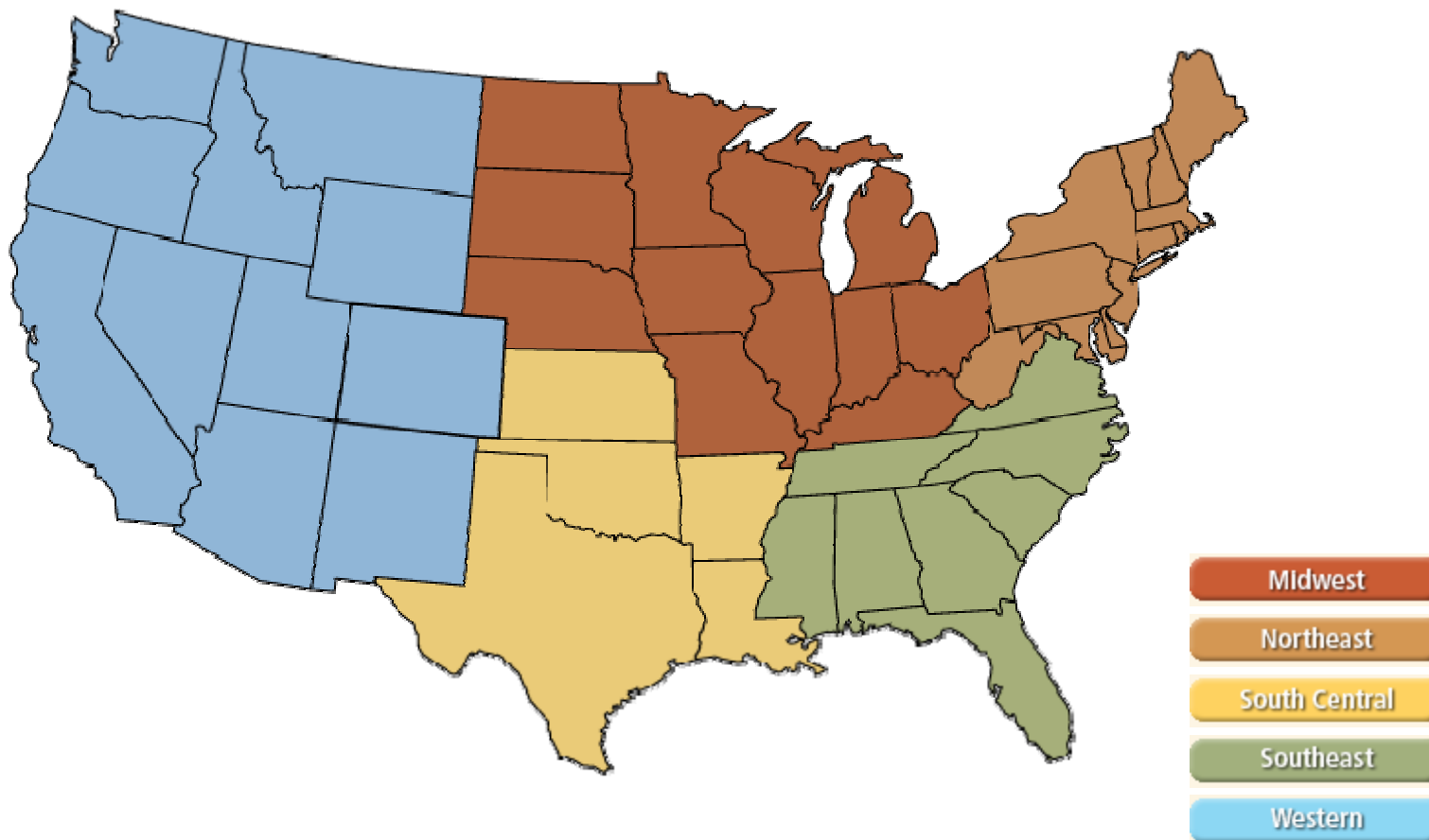
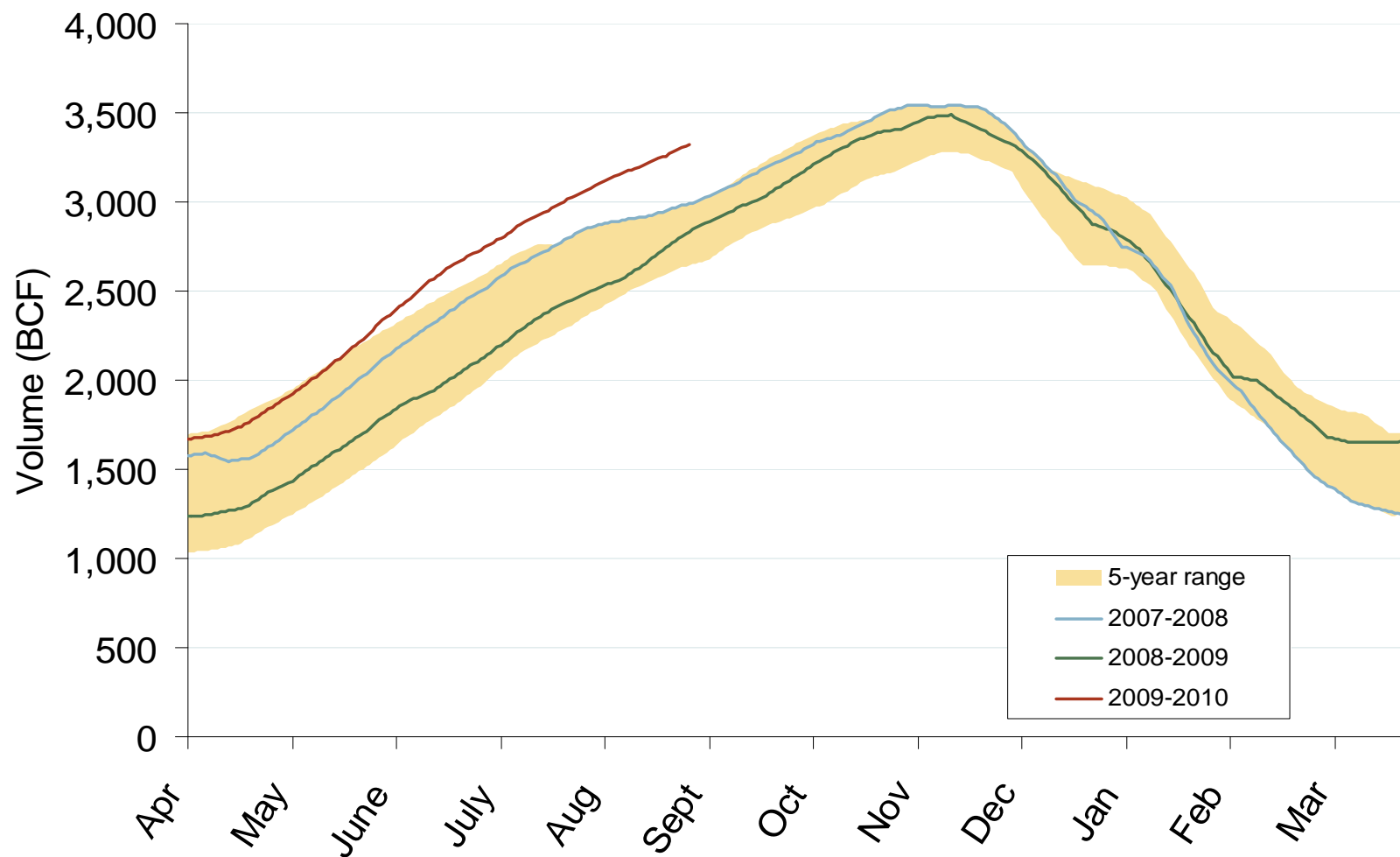


# Natural Gas Market National Overview



## Natural Gas Market Overview: National Storage

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

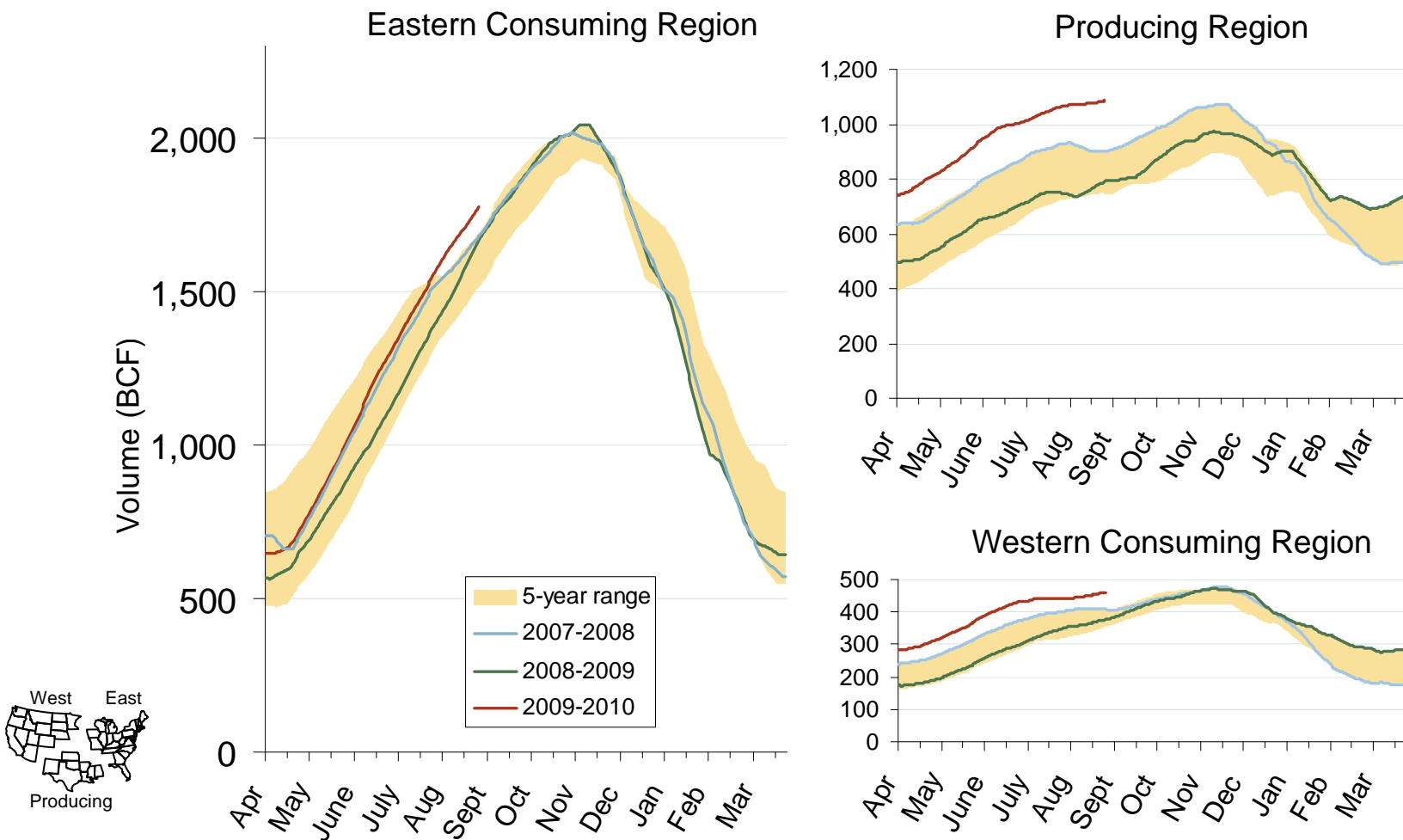
**Total U.S. Working Gas in Storage**

Source: Derived from EIA data.

Updated September 8, 2009

2003

## Regional Totals of Working Gas in Storage

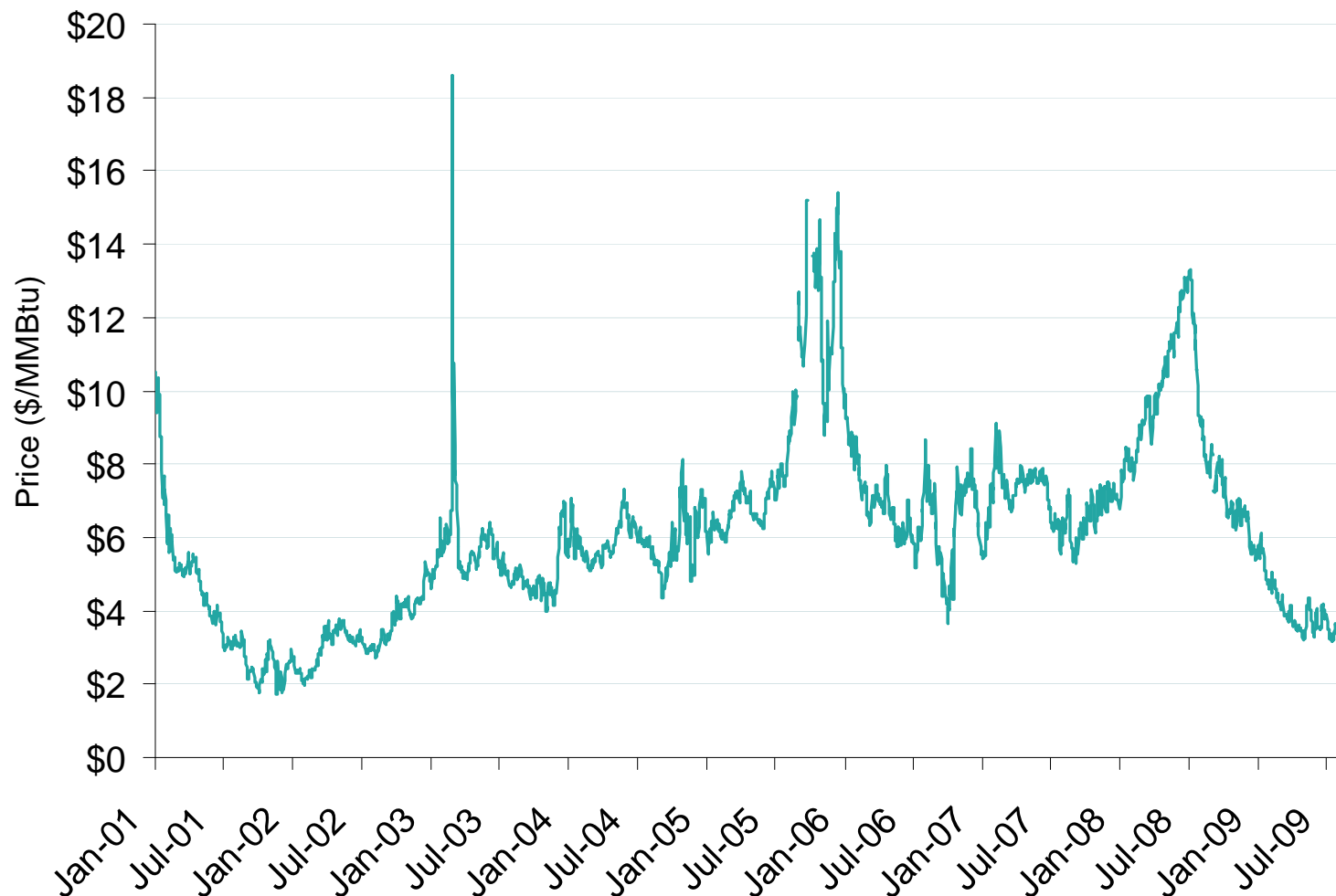


Source: Derived from EIA data.

Updated September 8, 2009

2004

## Henry Hub Natural Gas Daily Spot Prices 2001-2009



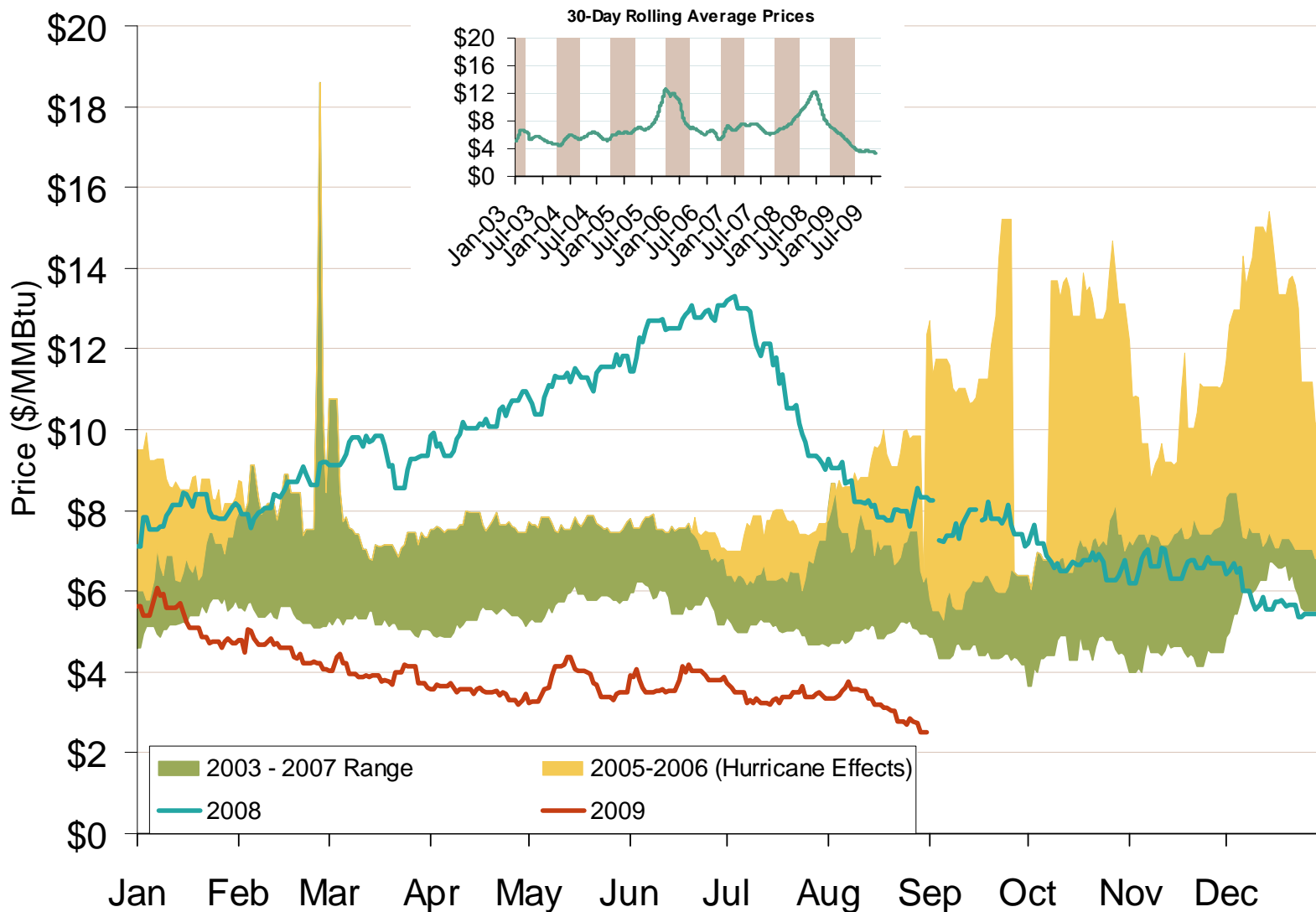
Source: Derived from *Platts* data.

Updated September 8, 2009<sub>2001</sub>

Natural Gas Market Overview: 5 Year Range of Henry Hub Spot Prices

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

# Henry Hub Natural Gas Daily Spot Prices 2008, 2009 and 2003-2007 Year Range



Source: Derived from *Platts* data.

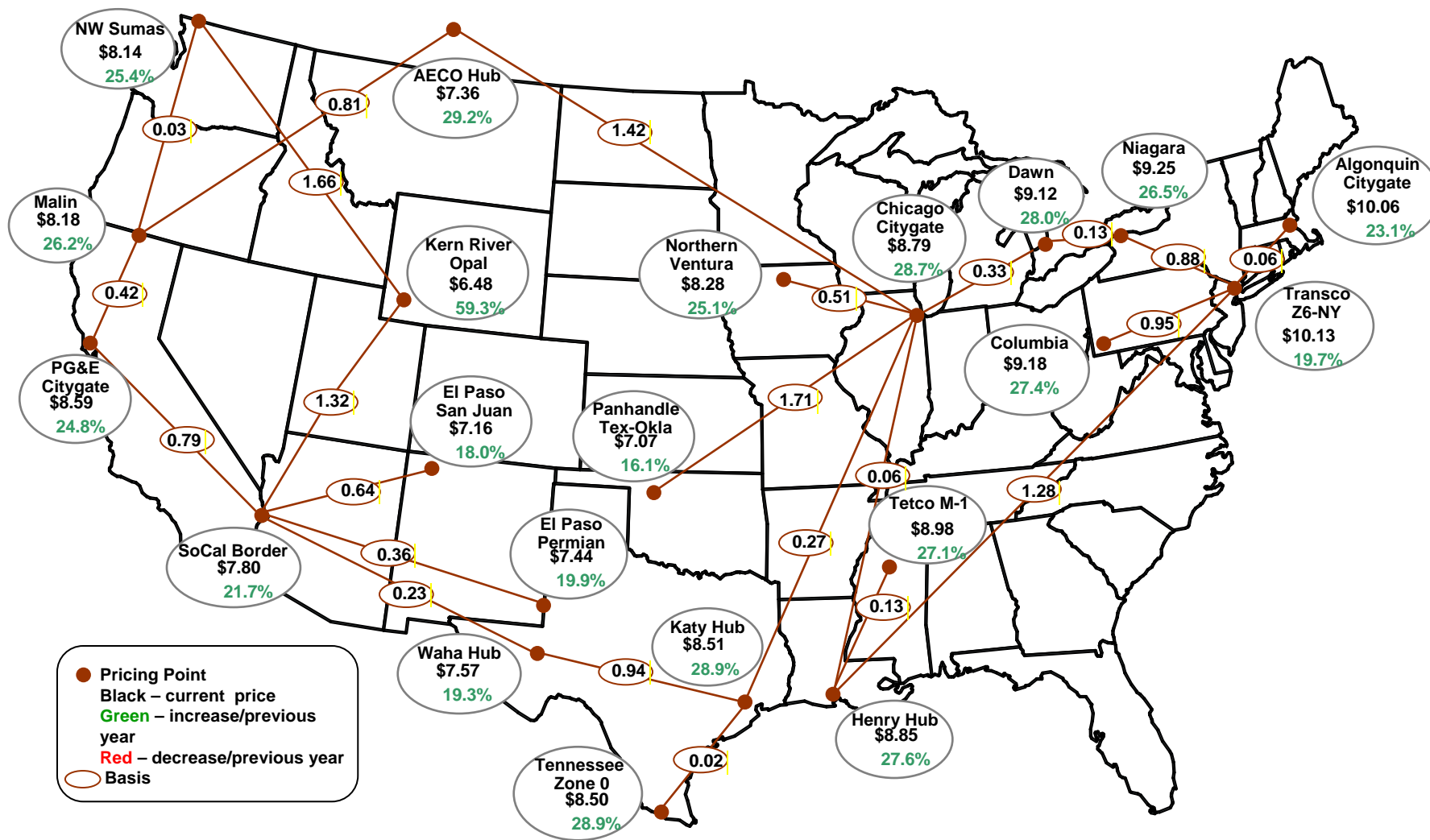
Updated September 8, 2009

2085

Natural Gas Market Overview: Spot Gas Prices

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

# Average Spot Gas Prices, 2008



Source: Derived from Platts data.

Updated February 6, 2009

## Natural Gas Market Overview: Production By Region

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

## Regional Natural Gas Production

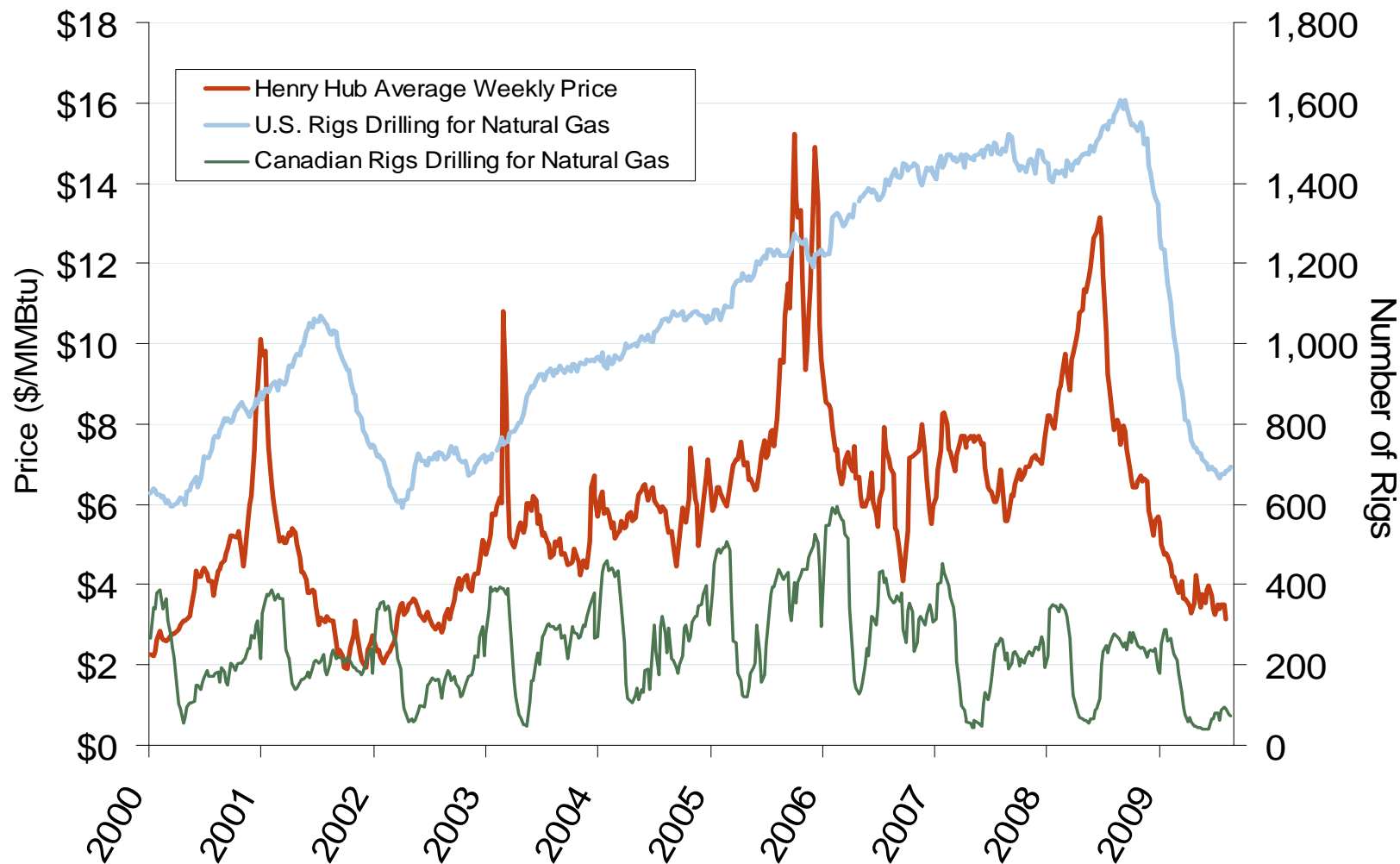


Source: Derived from *Bentek* data.

\* On July 1, 2009 Bentek redefined its regions, moving some of the southern Midcontinent production to the Southeast, which is included in Gulf series.

Updated September 14, 2009 2182

## U.S. and Canadian Natural Gas Drilling Rig Count and Daily Spot Prices



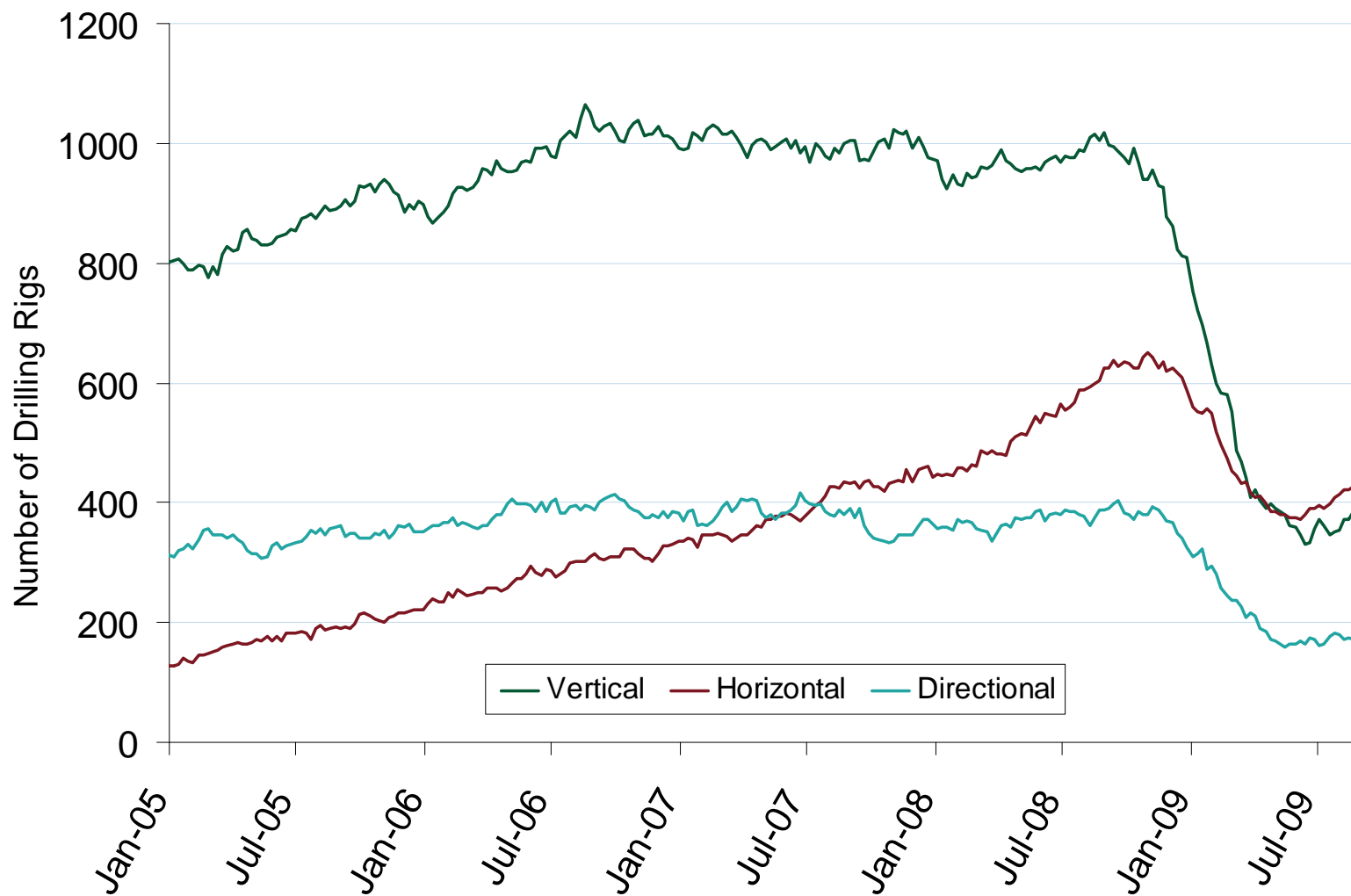
Source: Derived from *Platts* and *Baker Hughes* data.

Updated September 8, 2009

2007



## U.S. Oil and Natural Gas Drilling Rig Count by Type

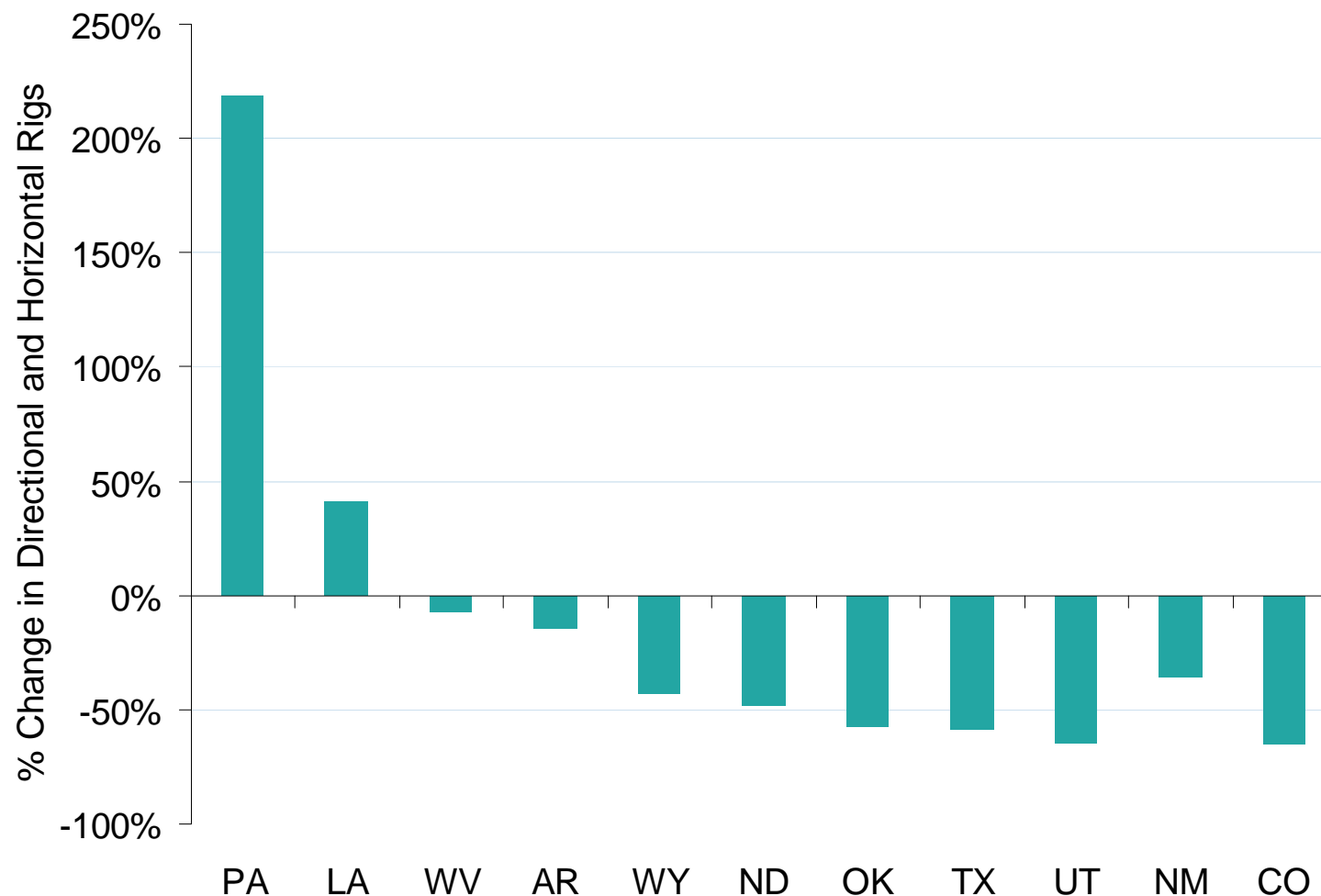


Source: Derived from *Platts* and *Baker Hughes* data.

Updated September 8, 2009

20018

## State Level Oil and NG Drilling Rig Count Change From the September 2008 Peak

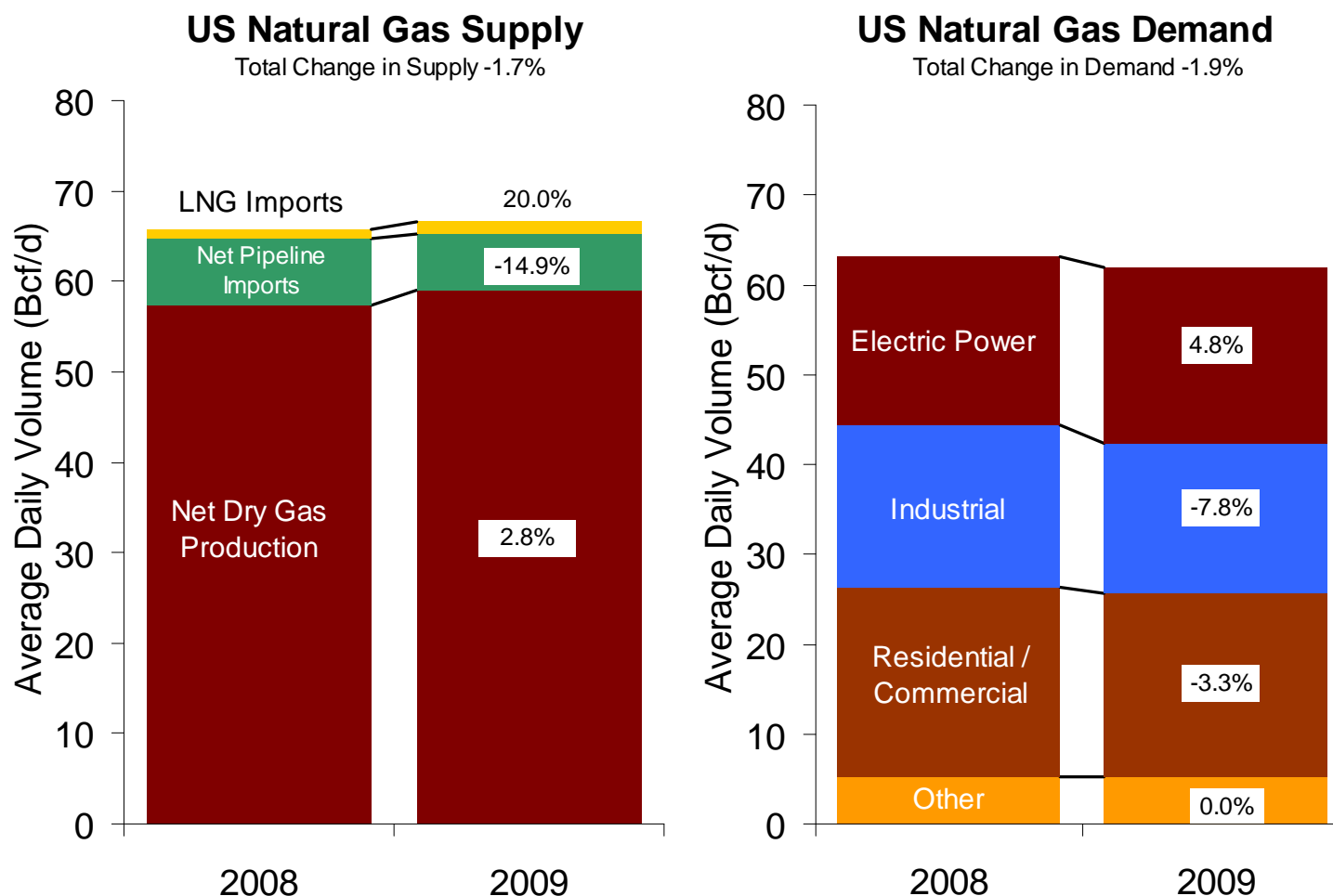


Source: Derived from *Platts* and *Baker Hughes* data.

Updated August 7, 2009

20019

## U.S. Natural Gas Supply and Demand 2008 vs. 2009: January - August



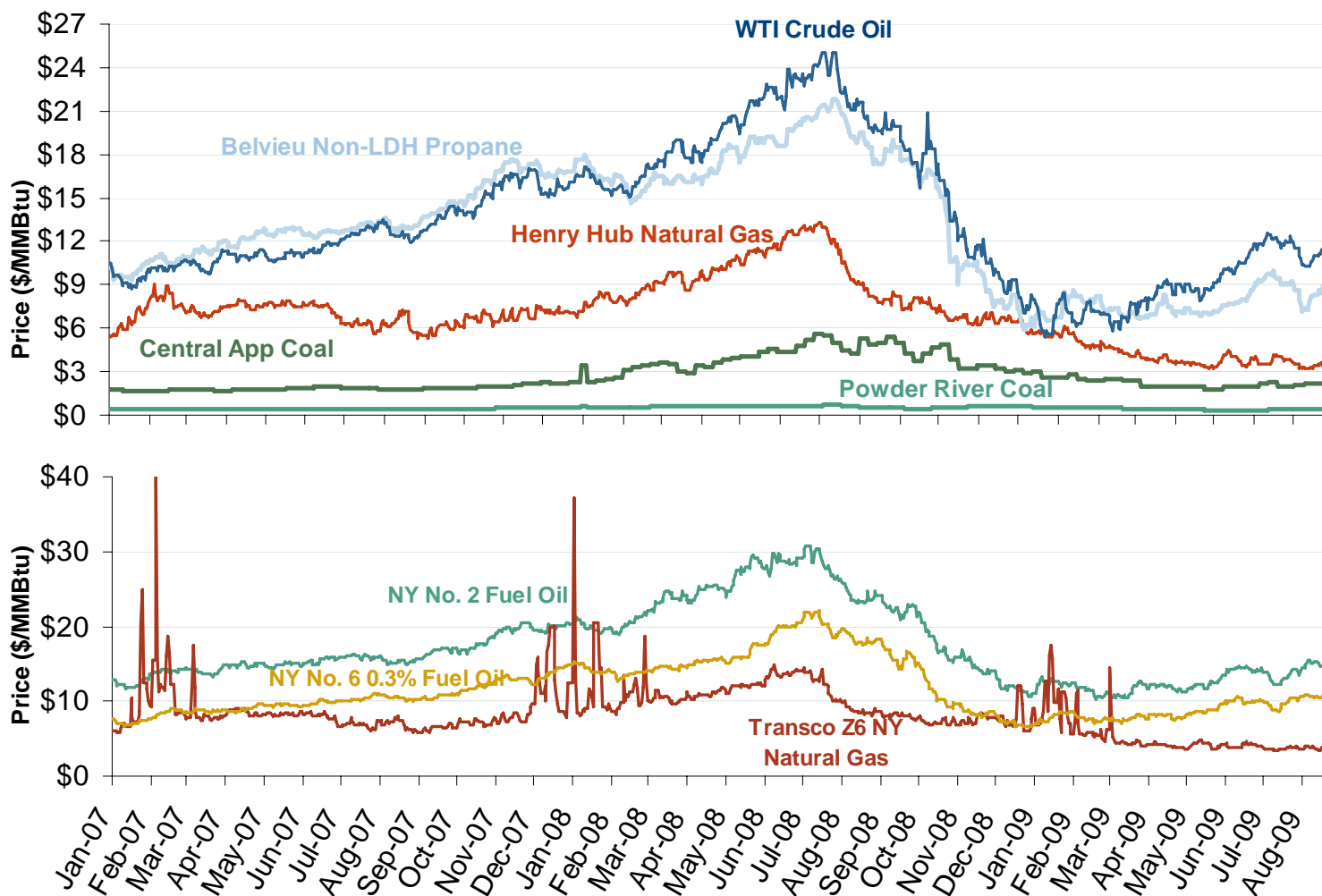
Source: Derived from Bentek data.

Updated September 8, 2009

## Natural Gas Market Overview: Oil, Coal and Natural Gas Prices

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

## Oil, Coal and Natural Gas Daily Spot Prices



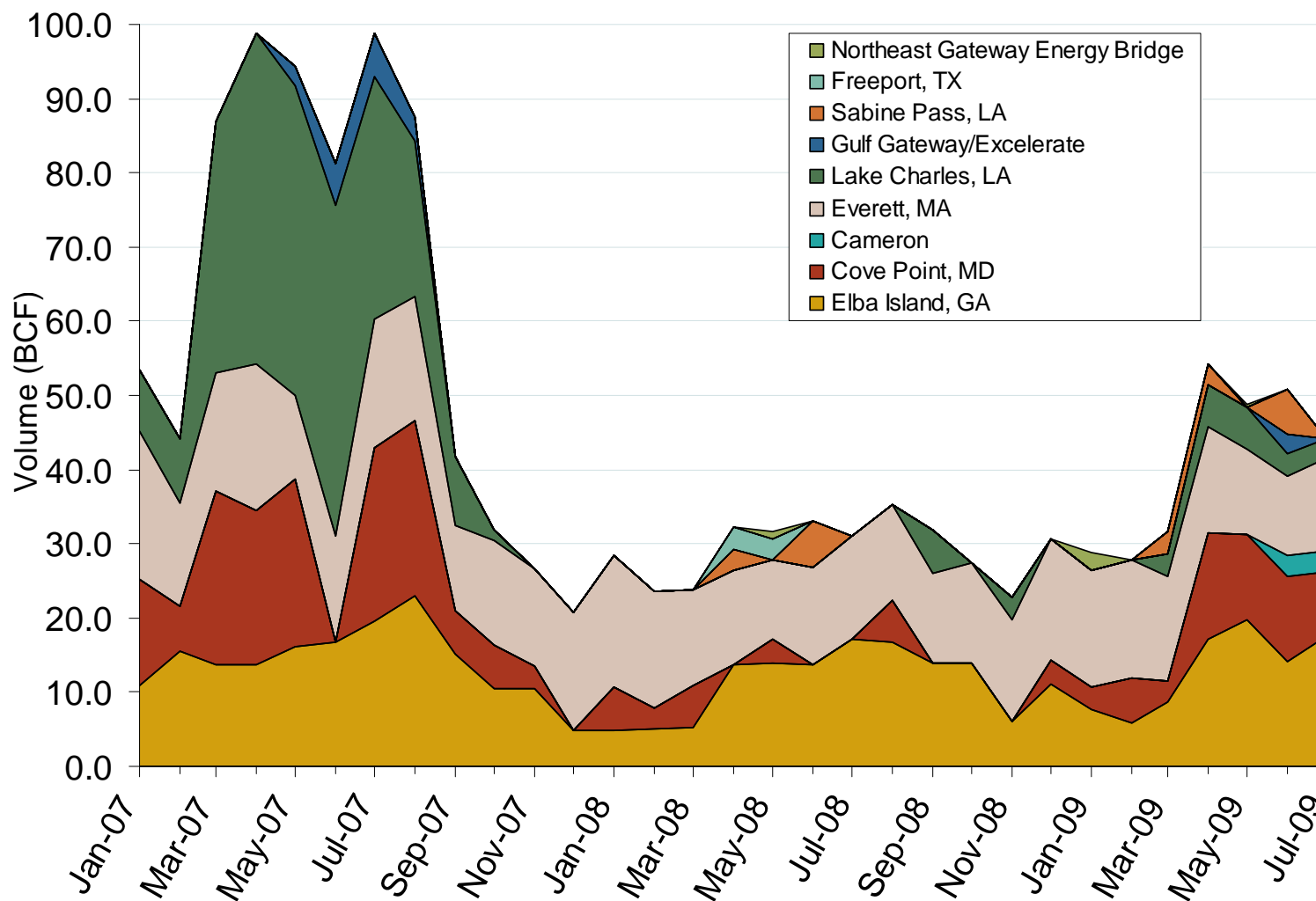
Source: Derived from ICE and Bloomberg data.

Note: Coal prices are quoted in \$/ton. Conversion factors to \$/MMBtu are based on contract specifications of 12,000 btus/pound for Central Appalachian coal and 8800 btus/pound for Powder River Basin coal.

Updated September 8, 2009

2160

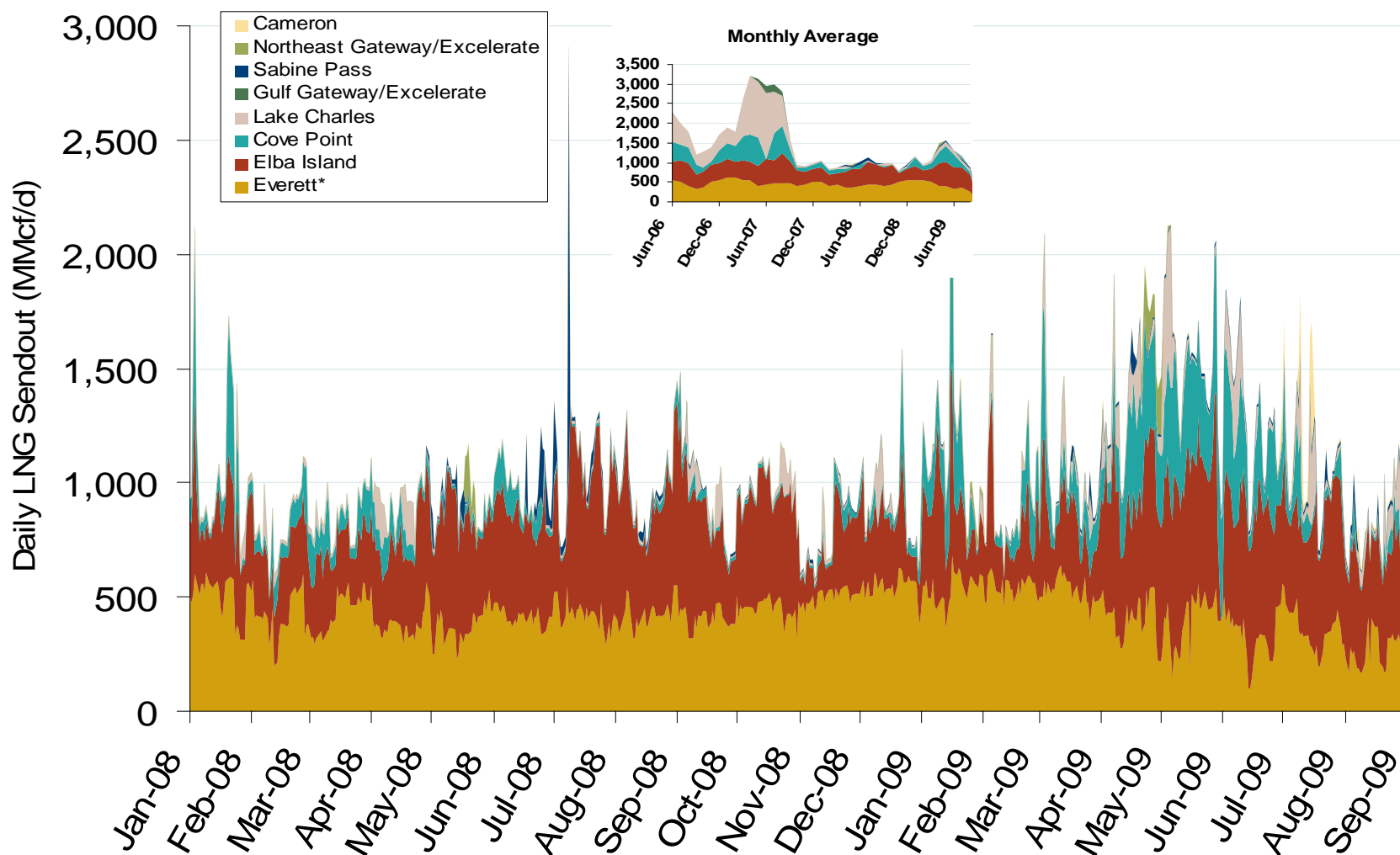
# Monthly Gas Imports at Existing U.S. LNG Facilities



Source: Derived from DOE Office of Fossil Energy data.

Updated September 8, 2009

## Daily Gas Sendout from Existing LNG Facilities



Source: Derived from Bentek data.

\* Everett data includes flows onto the AGT and TGP interstate lines, plus estimates of flows to the Mystic 7 power plant, Keyspan Boston Gas, and LNG trucked out of the terminal. Excludes Freeport LNG which flows via intrastate pipelines.

Updated September 8, 2009

## World LNG Estimated September 2009 Landed Prices



Source: *Waterborne Energy, Inc.* Data in \$US/MMBtu.

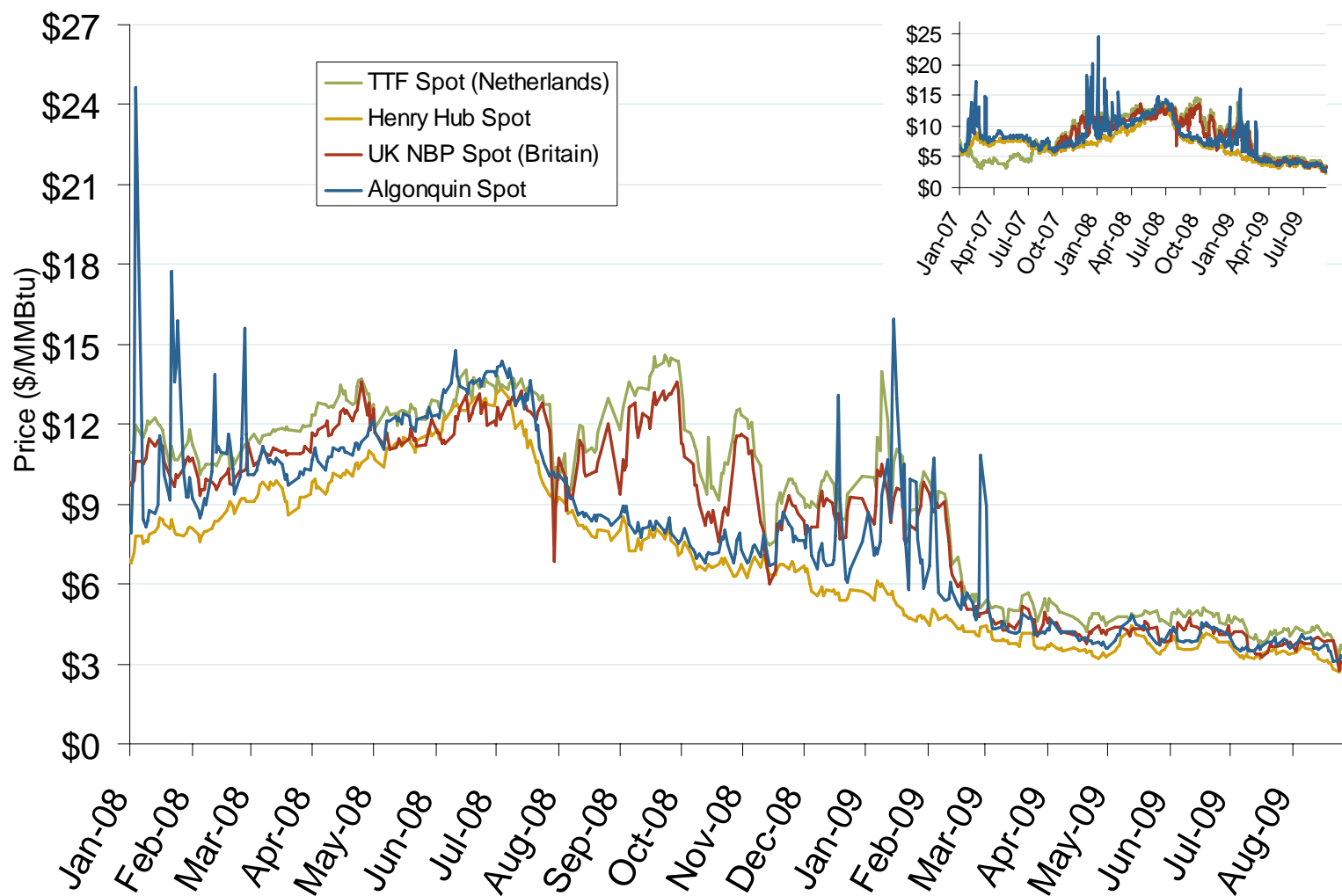
Updated September 8, 2009

2169

## Natural Gas Market Overview: European &amp; US Gas Prices

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

## Atlantic Basin European and US Spot Natural Gas Prices

Source: Derived from *Bloomberg* and *ICE* data.

Updated September 8, 2009

2162



## Henry Hub and AECO Prompt-Month Futures Prices



Source: Derived from ICE data.

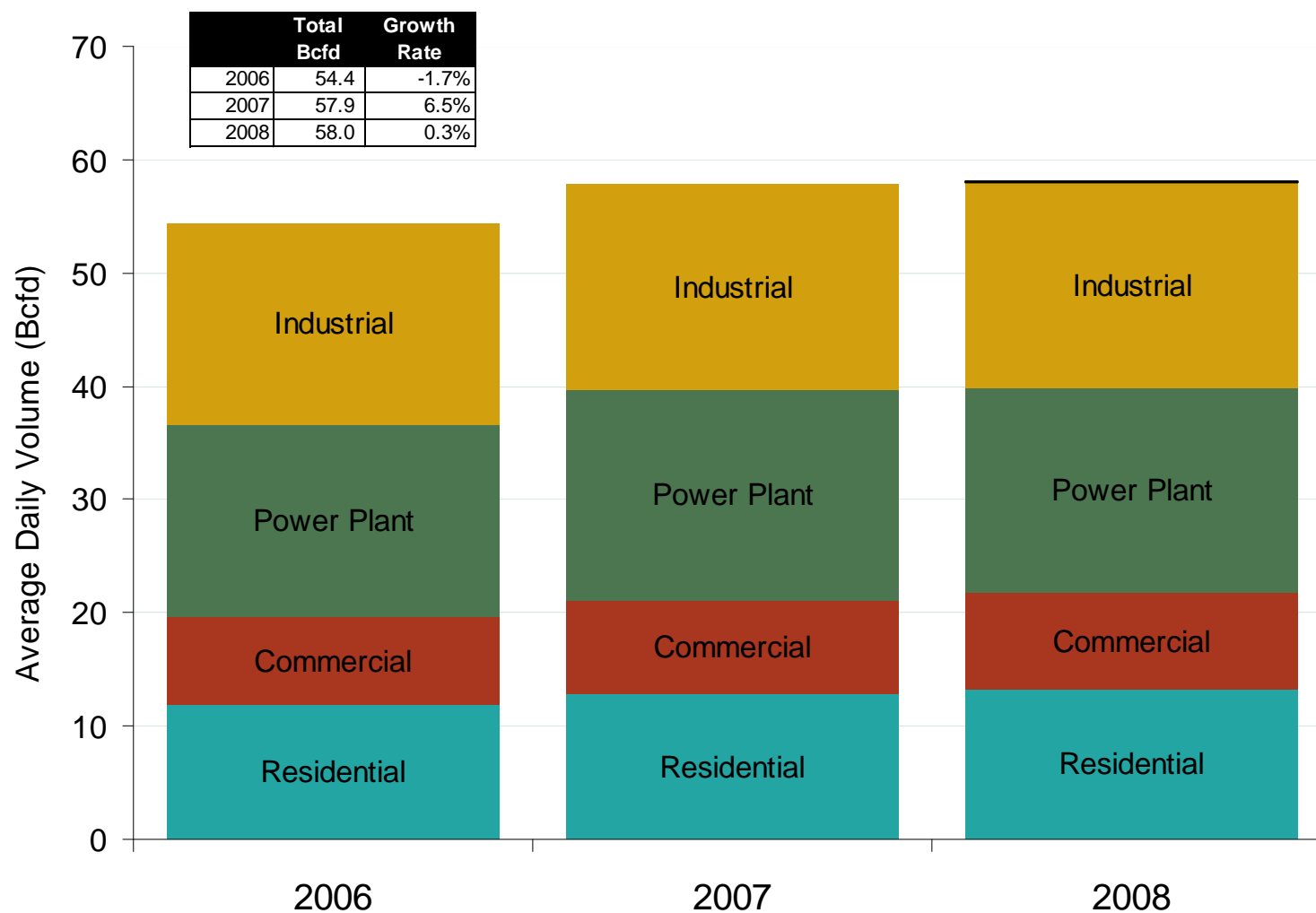
Updated September 8, 2009

2172

## Natural Gas Market Overview: Annual NG Consumption

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

# U.S. Natural Gas Consumption – Lower 48 States



Source: Derived from EIA data

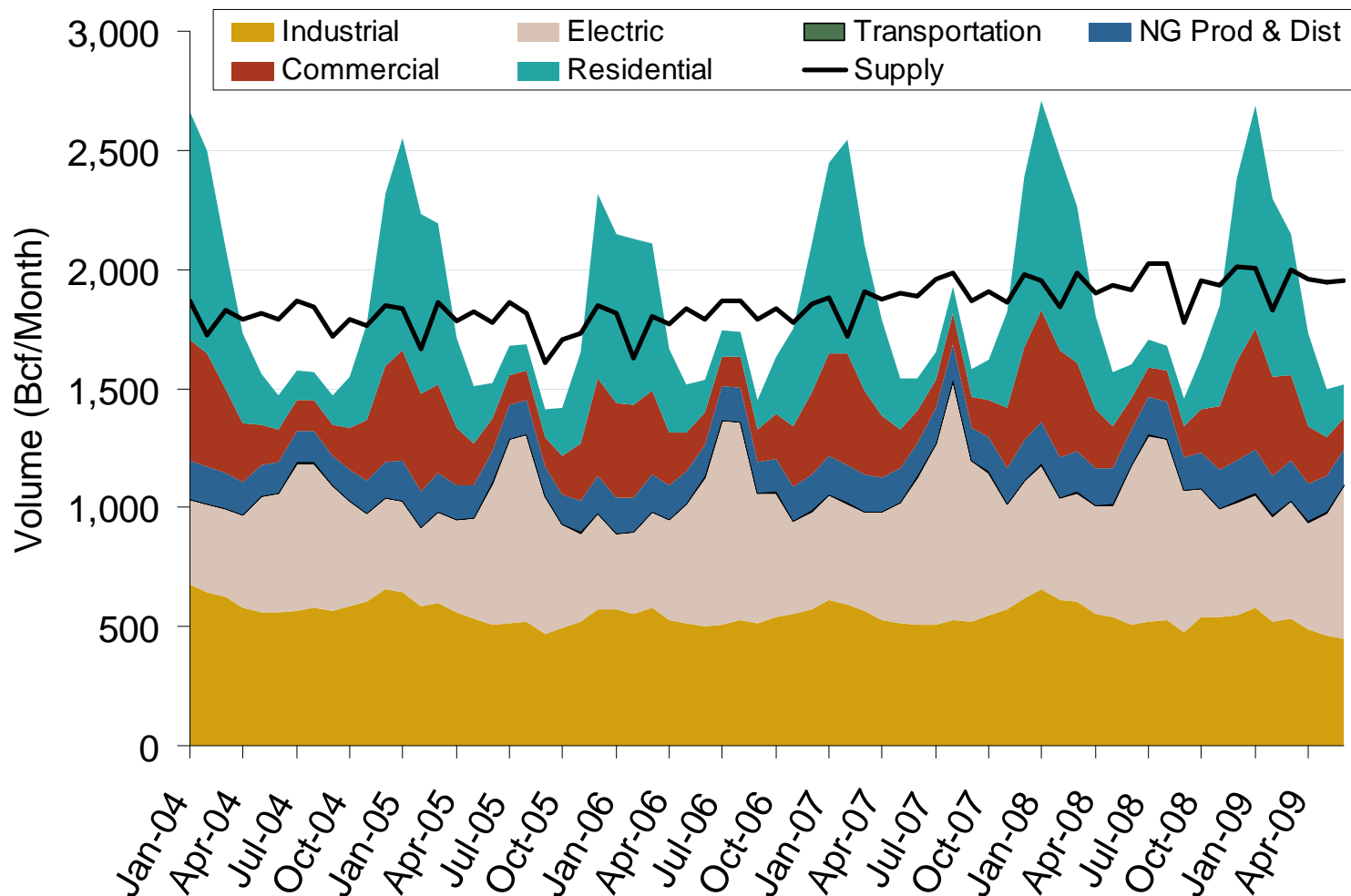
Updated April 7, 2009

20012

## Natural Gas Market Overview: Consumption by Sector

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

## Annual U.S. Natural Gas Consumption by Sector



Note: Supply includes lower 48 state production, net pipeline imports, and LNG imports.

Source: Derived from EIA data

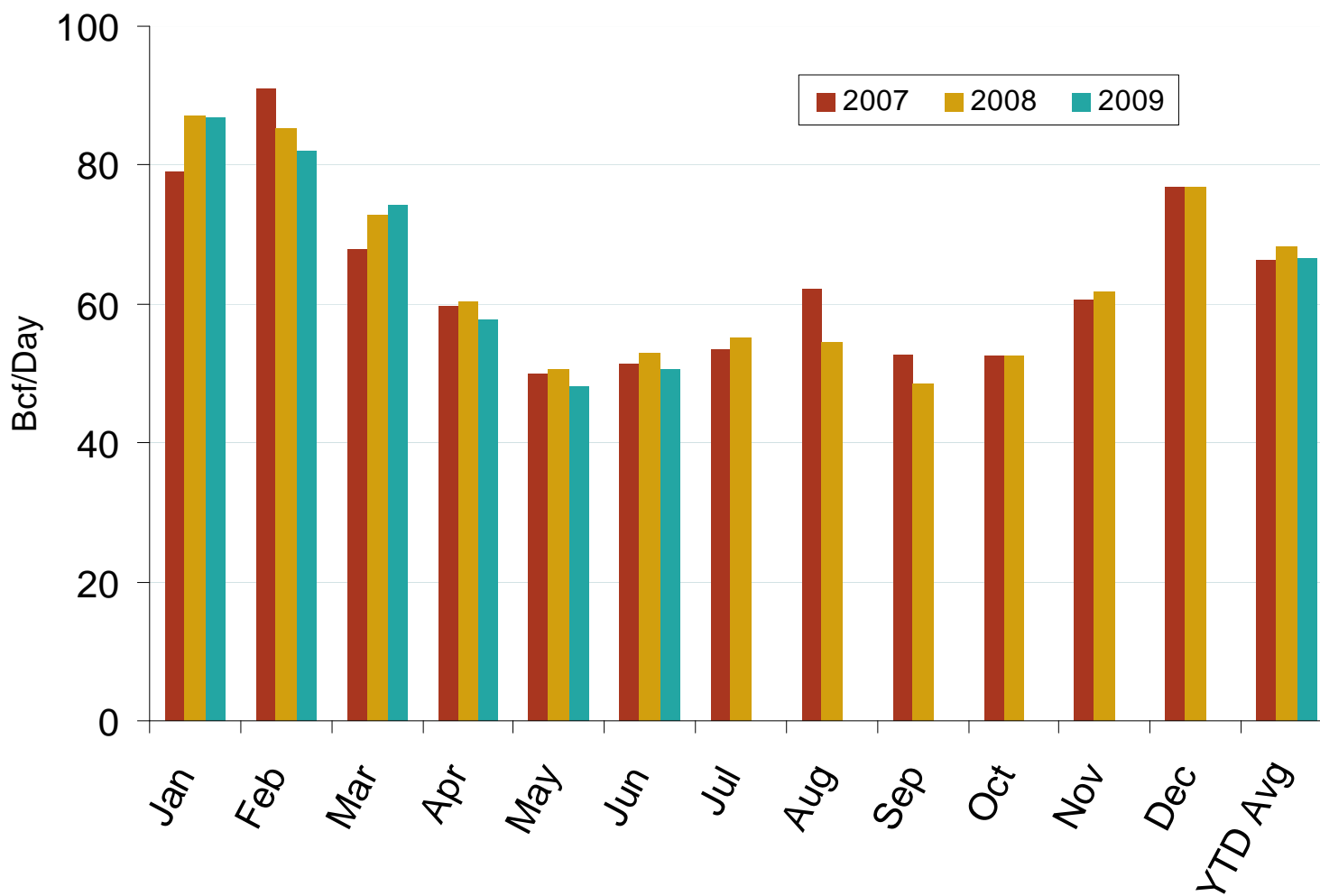
Updated September 8, 2009

20013

## Natural Gas Market Overview: YTD Consumption

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

## Year-to-date U.S. Natural Gas Consumption

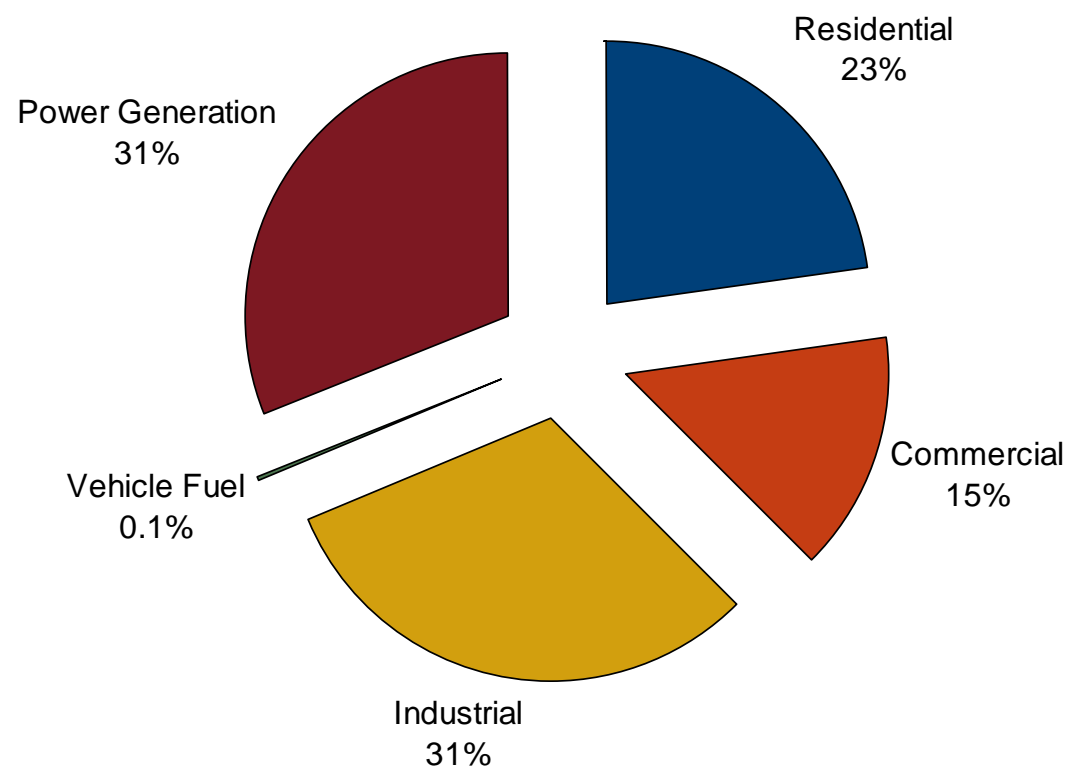


Source: Derived from EIA data.

Updated September 8, 2009

20014

## U.S. Natural Gas Demand by Sector 2008

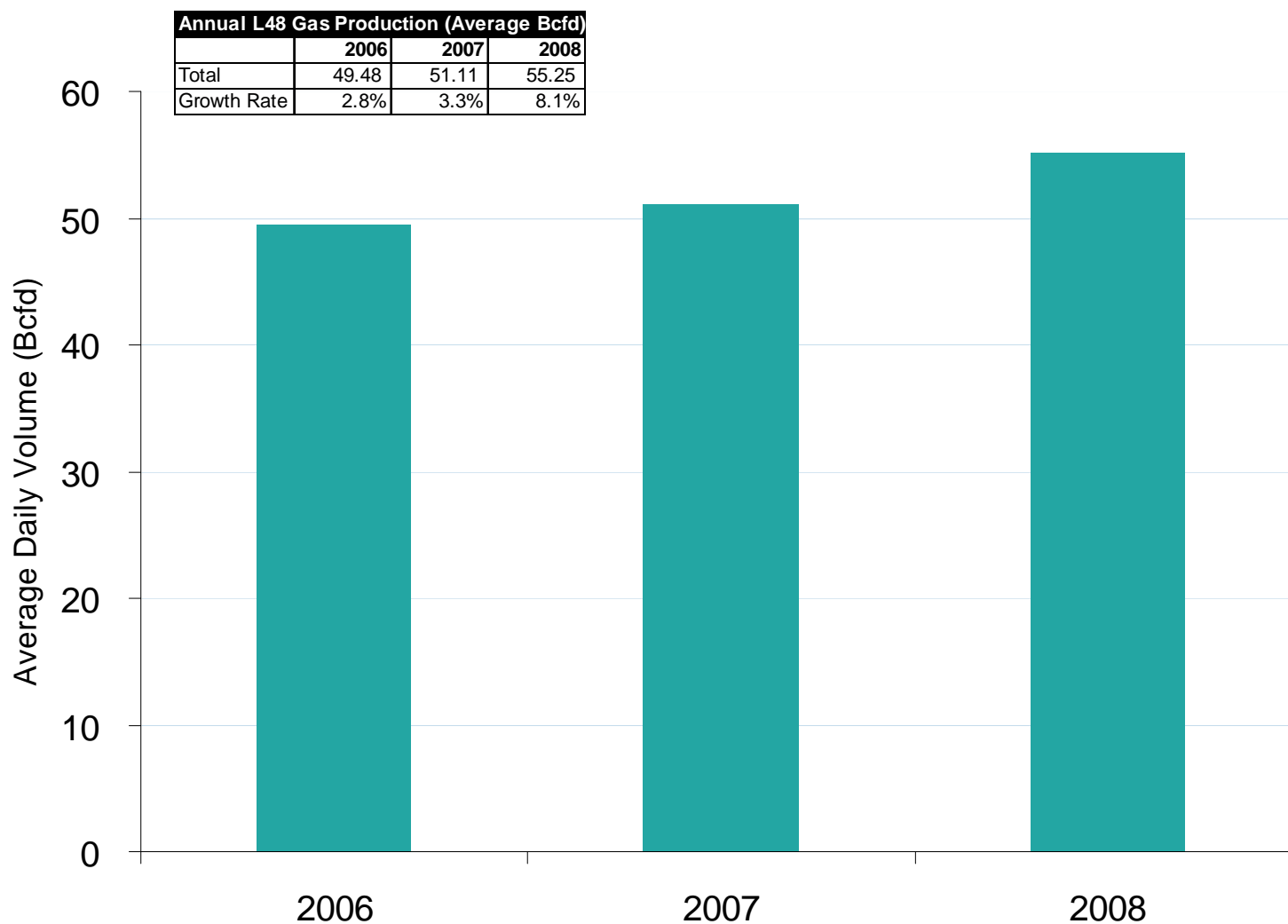


Source: Derived from EIA data.

Updated April 7, 2009

2002

## U.S. Dry Gas Production – Lower 48 States



Source: Derived from EIA data.

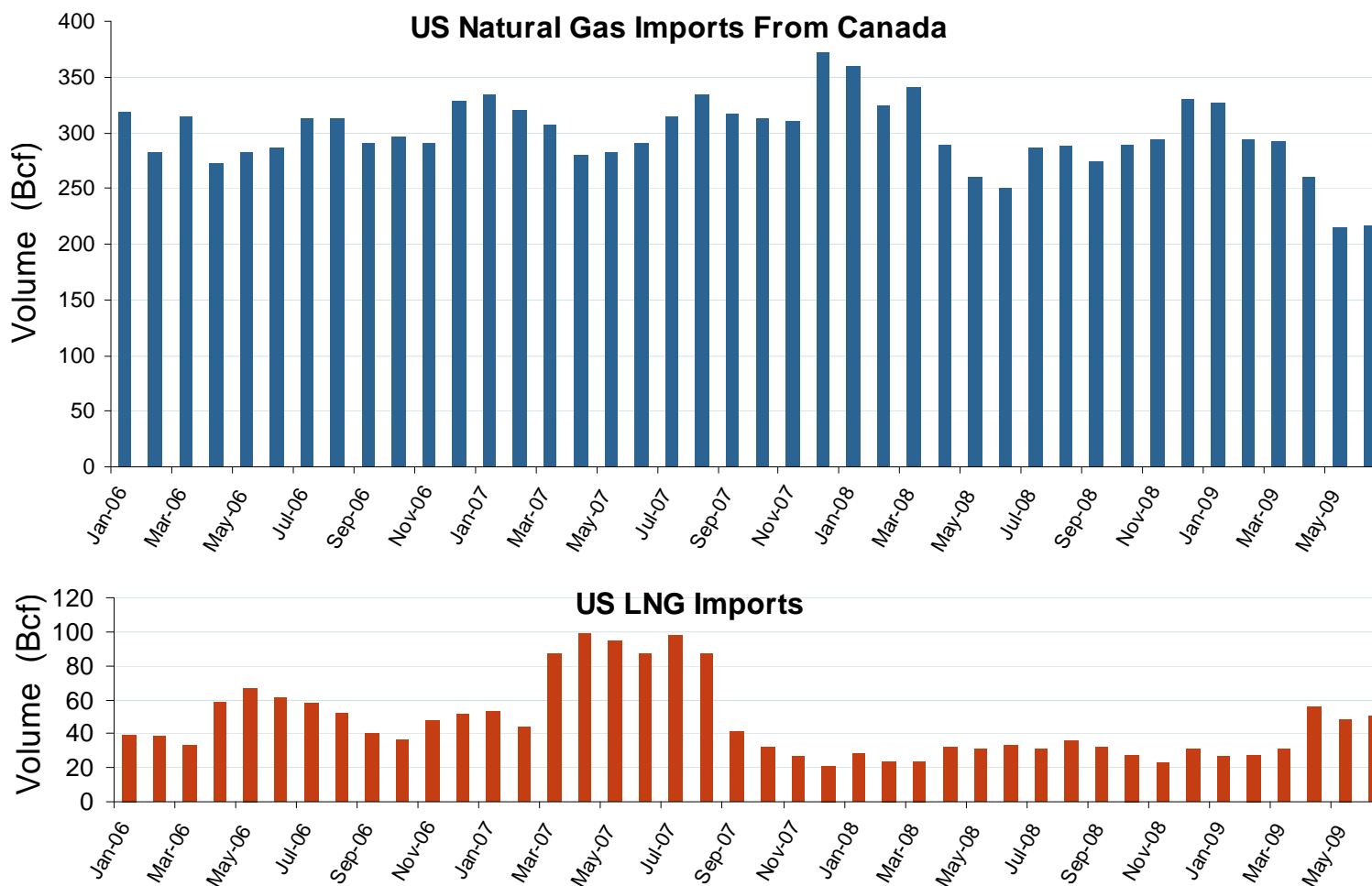
April 7, 2009

20017

Natural Gas Market Overview: Natural Gas Imports

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

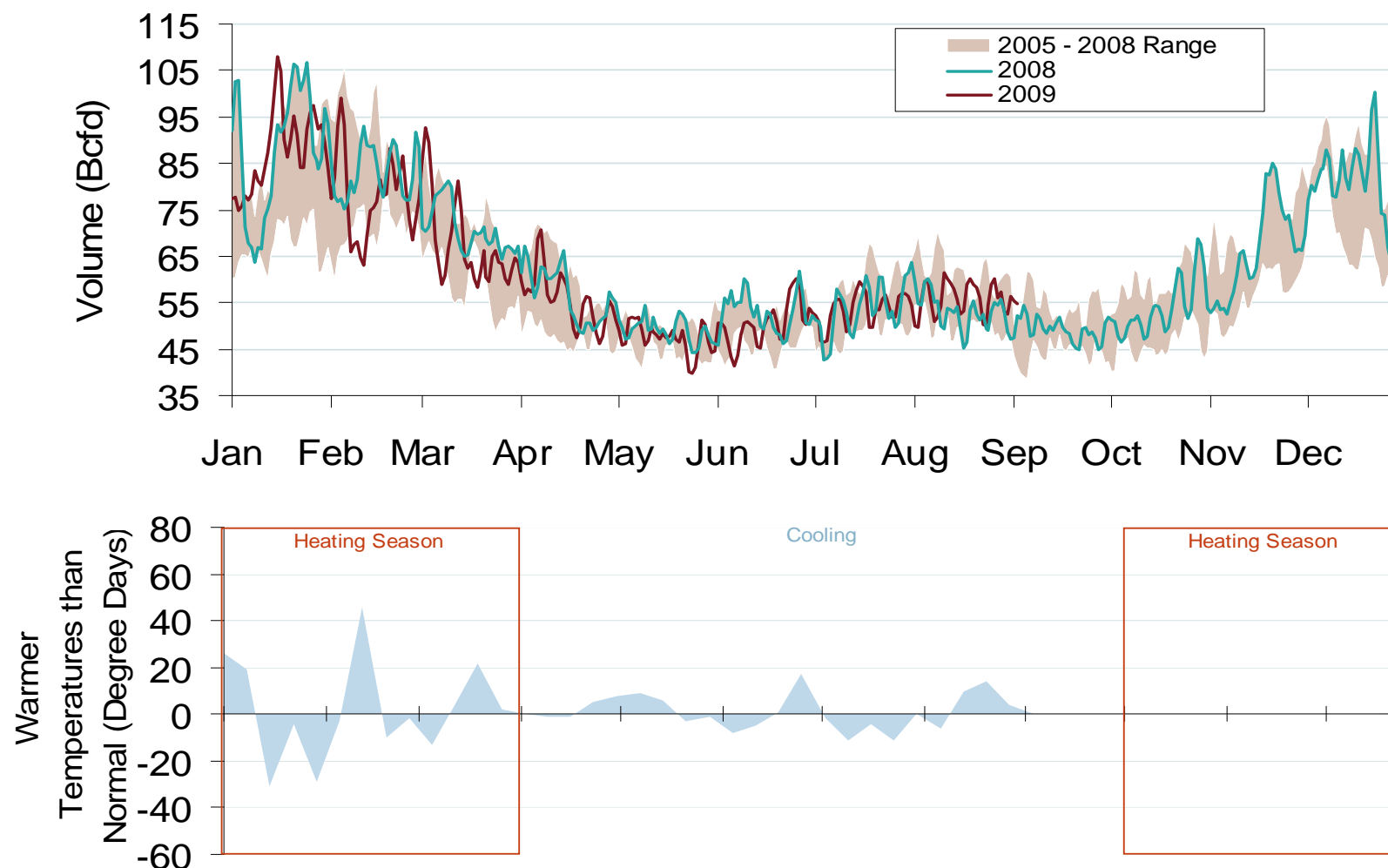
# Canadian and LNG Natural Gas Imports



Source: EIA Natural Gas Monthly

Updated September 8, 2009

## Total U.S. Natural Gas Demand (All Sectors) and Temperatures

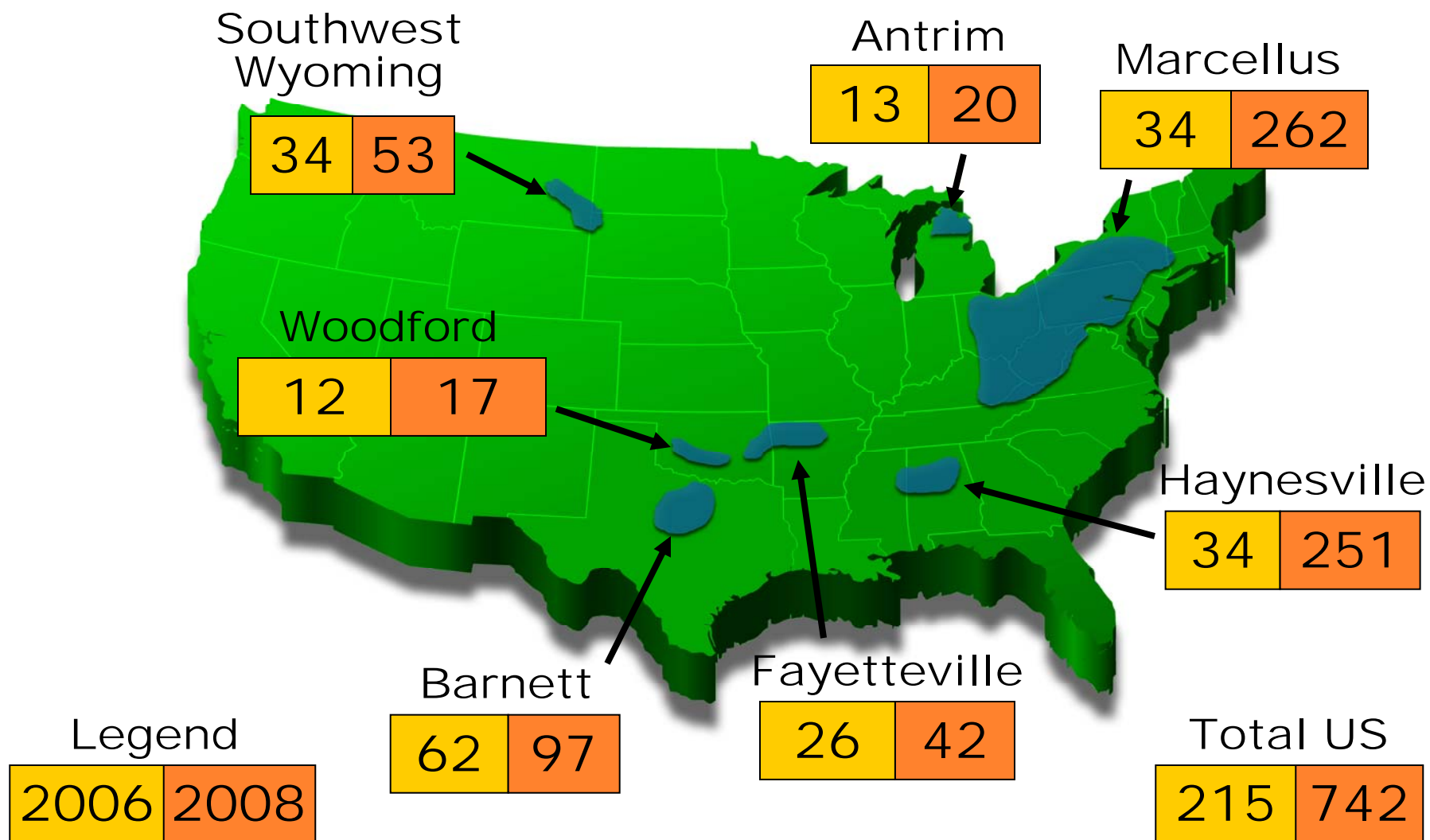
Source: Derived from *Bentek Energy* data.

Updated September 8, 2009

20009



## Estimated Recoverable NG For Select Shale Basins (TCF)



Source: Derived From American Clean Skies Foundation

Updated November 18, 2008

20010